NEOGOVE PE – TRAINING GUIDE	
Objective:	This Training Guide focuses on how to navigate NEOGOV PE and perform the routine employee and manager tasks that may arise during the course of a performance plan (evaluation) year.

Pre-Requisite Requirements:

- The Agency is actively using NEOGOV PE for performance management.
- Users have been activated in the system.
- Evaluations have been assigned.

Helpful Tips:

- Performance plans can also be called evaluation plans.
- Clicking on the NEOGOV icon in the upper left hand corner always returns a user to their dashboard.

INDEX: Select hyperlink below to go to information.

1. Login
2. Overview of NEOGOV PE
    a. Dashboard
    b. Journal Entries
    c. Employee Details
        i. Reports
        ii. Organization Chart
    d. Menu Bar (Employees, Performance Evaluations, Library, Trainings, Reports)
    e. Other Items (Search bar, email, calendar, profile menu)
3. Performance Evaluation (Plan) Overview
4. Edit/Start Performance (Evaluation) Plan
    a. Add/Delete Objectives
    b. Assignment of Bulk Objectives
    c. Add/Delete Comptencies
    d. Notes/Attachments/Tasks Within the Evaluation
    e. Start Evaluation
5. Acknowledgement of Plan (Employee)
6. Ratings
7. Acknowledgement of Rating (Employee)
8. Reports

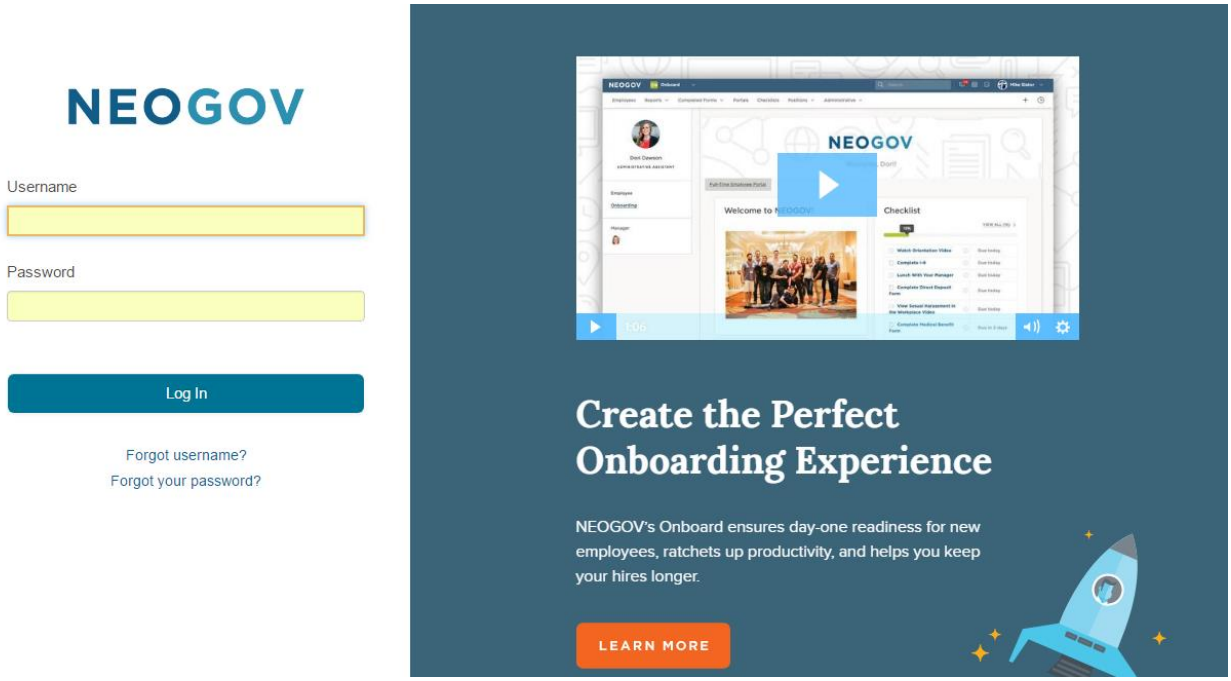
LOGIN

You can access NEOGOV PE using the following link: https://login.neogov.com/signin?siteCode=PE

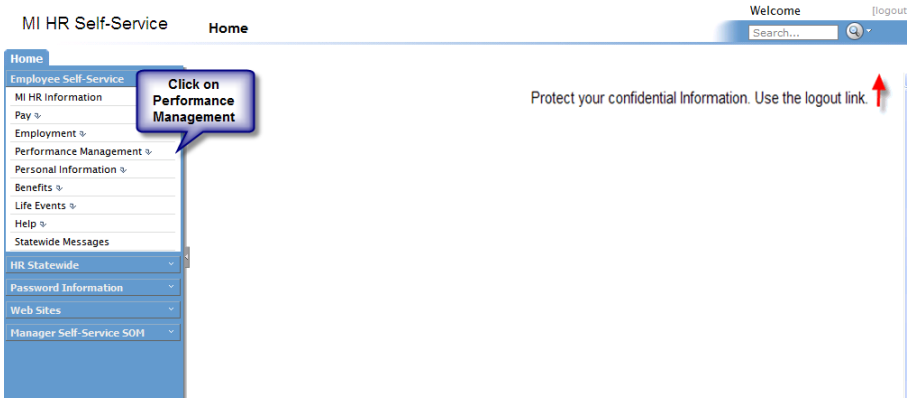
You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**. (this will change to "h" id)

NOTE: Current NEOGOV Insight HR Users will use their Insight username and password.

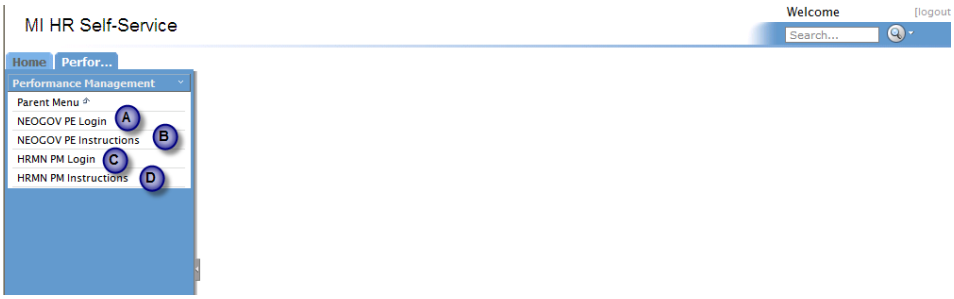
1. Log into the NEOGOV PE site using your **Username** and **Password.** Click on the **Sign In >>** button.



2. The system can also be accessed in MI HR Self Service; under the **Performance Management** bookmark.



3. In the Performance Management bookmark are links to the following:
   A. **NEOGOV PE login**--If you have been provided with an email to access NEOGOV PE, use this link.
   B. **NEOGOV PE instructions**--For information on how to use NEOGOV PE including an overview of the system, use this link.
   C. **HRMN PM login** (HRMN Performance Management system)--If you have current plans in the HRMN PM, you will finish your plan there before using NEOGOV PE. Therefore, use this link.
   D. **HRMN PM instructions**--For information on how to use HRMN PM, use this link.



Dashboard

1. Upon login, you will see your **My Dashboard** screen. The employee dashboard serves as your personal homepage. It contains a section for assigned tasks and icons/links to your performance evaluations.

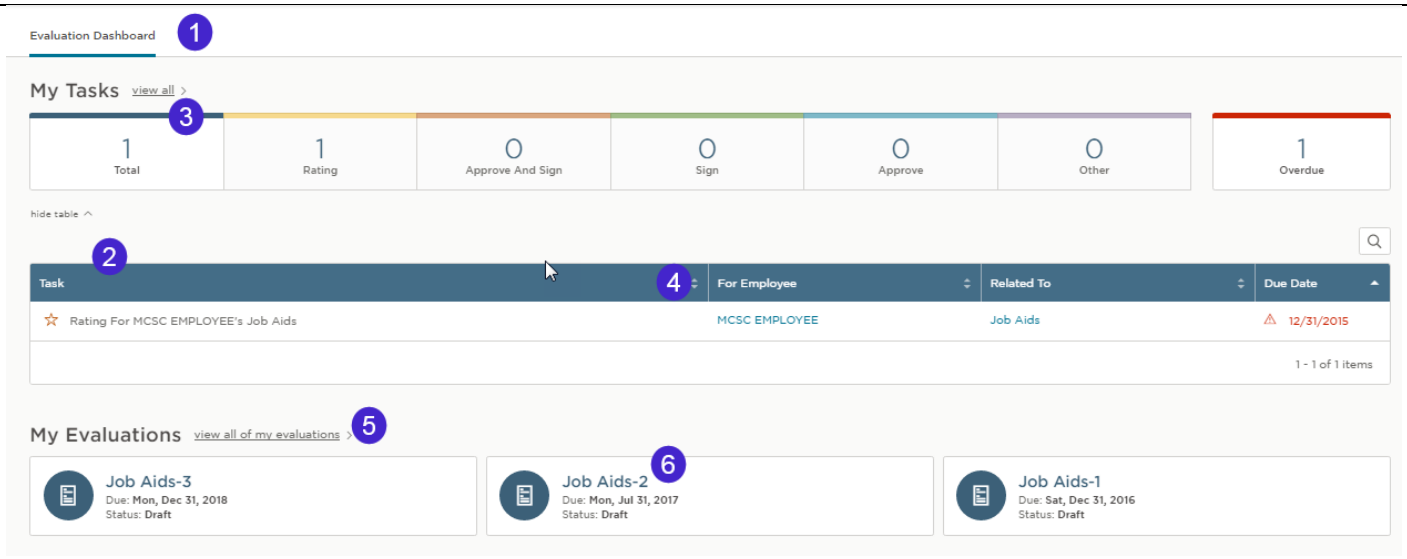
2. The **My Tasks** section displays a complete list of your current tasks including personal tasks you have created and others related to performance (evaluation) or development plans assigned to you. Tasks are covered in detail later in this document. The **Related To** column indicates the purpose of the task and provides a direct link to that item.

3. Only current tasks are displayed by default. You can review completed tasks also by clicking the **View All** link, clicking on the **Current** drop down box and selecting **Completed**.

4. Columns can be sorted using the **Sort** symbol within the column header.

5. The **My Evaluations, View All of My Evaluations** link takes you directly to the Employee Details page where you can select and view your performance evaluation(s).

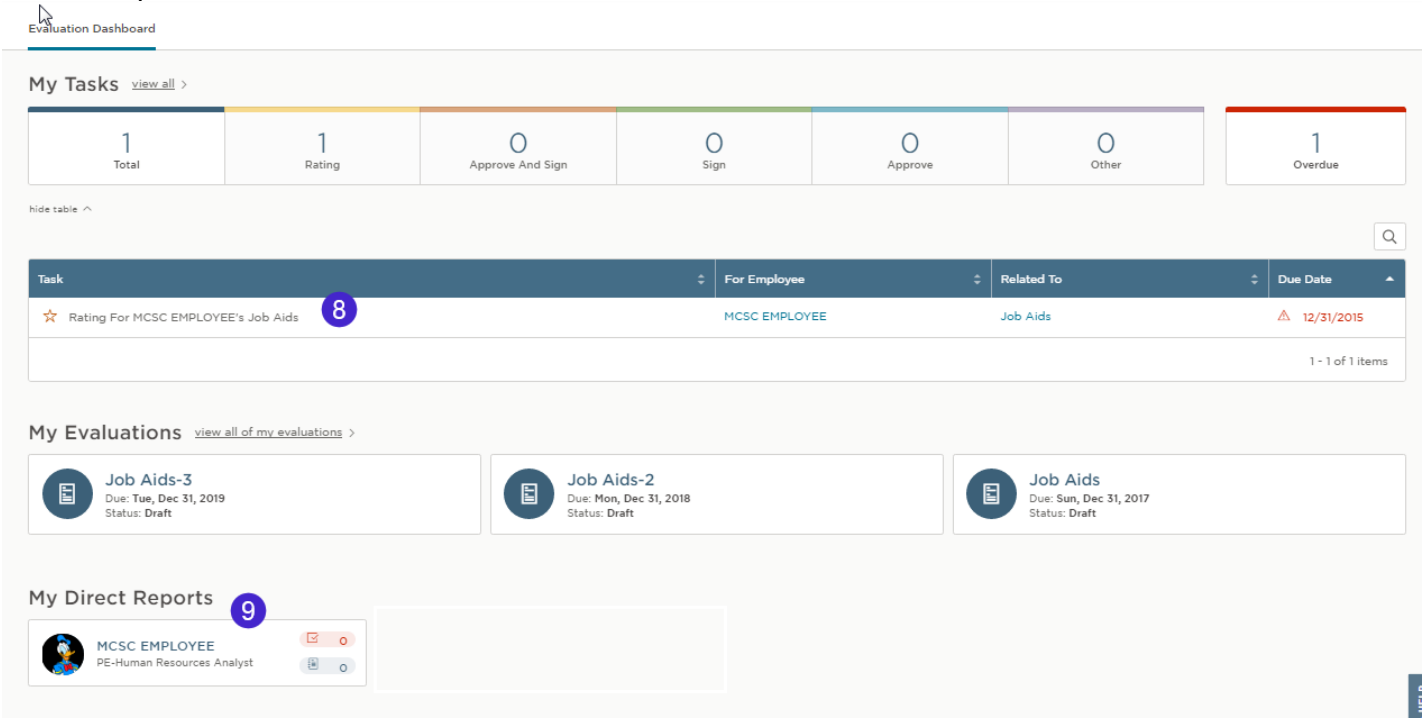
6. Clicking on the title of an evaluation takes you directly to that **Evaluation Details** page.



If you are a Manager, the dashboard will have a few additional sections/items available:

7. The Manager/Supervisor **Dashboard** will include your assigned direct reports. Their name(s) will appear beneath the **My Direct Reports** header. You will also see the Civil Service classification, overdue tasks, and ability to create journal entries for each employee in the direct reports section.

8. The **My Tasks** section includes tasks related to performance (evaluation) plans for you and your direct reports. These tasks - to conduct ratings - are assigned from the performance (evaluation) plan template.



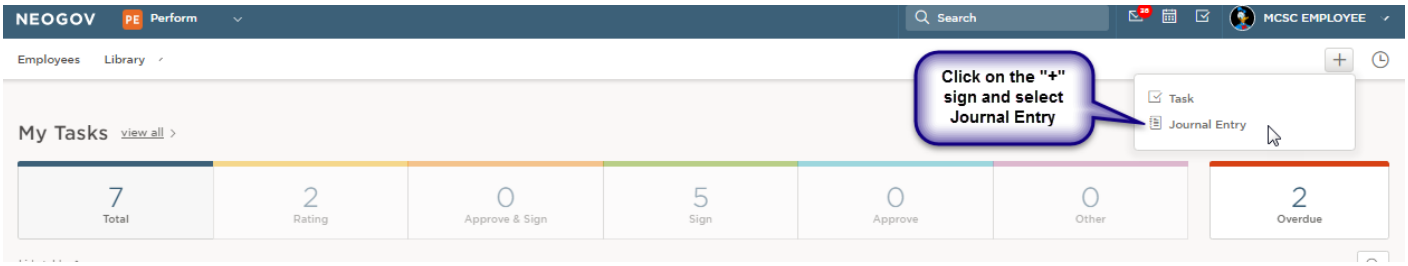
9. When you click on a Direct Report, you are taken to the employee's **Employee Details** page where you can view their position information in addition to their assigned performance evaluation list. The employee's **Dashboard** is not available to the manager/supervisor and will not appear in the list below their picture.

Journal Entries

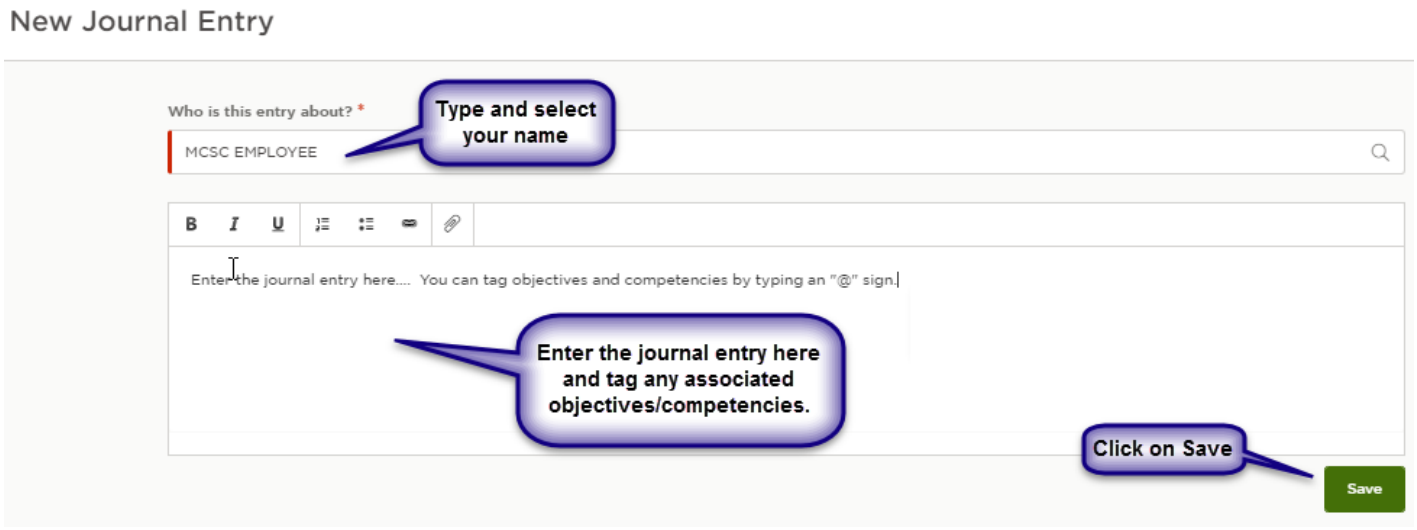
1. **Journal entries** are a helpful tool to encourage continuous communication between users of NEOGOV PE; for example, between a manager and direct reports. Journal entries can be entered from the **Dashboard** and are available to add within the rating card during a performance (evaluation) plan rating.
    a. Only the original owner of a journal entry can edit or delete it.
    b. Initially, all journal entries are private, and viewable only to the creator. A sharing feature does exist to allow for sharing an entry with other system users.
    c. Objectives and competencies can be tagged in the text of a journal entry to all for additional filtering within the system and specifically within the rating card during a performance (evaluation) plan rating.

2. After logging in, you will be at your **Dashboard**.

3. To enter a journal entry for **yourself (employee)**, click on the **+ sign** in the upper right hand corner and select **Journal Entry**.

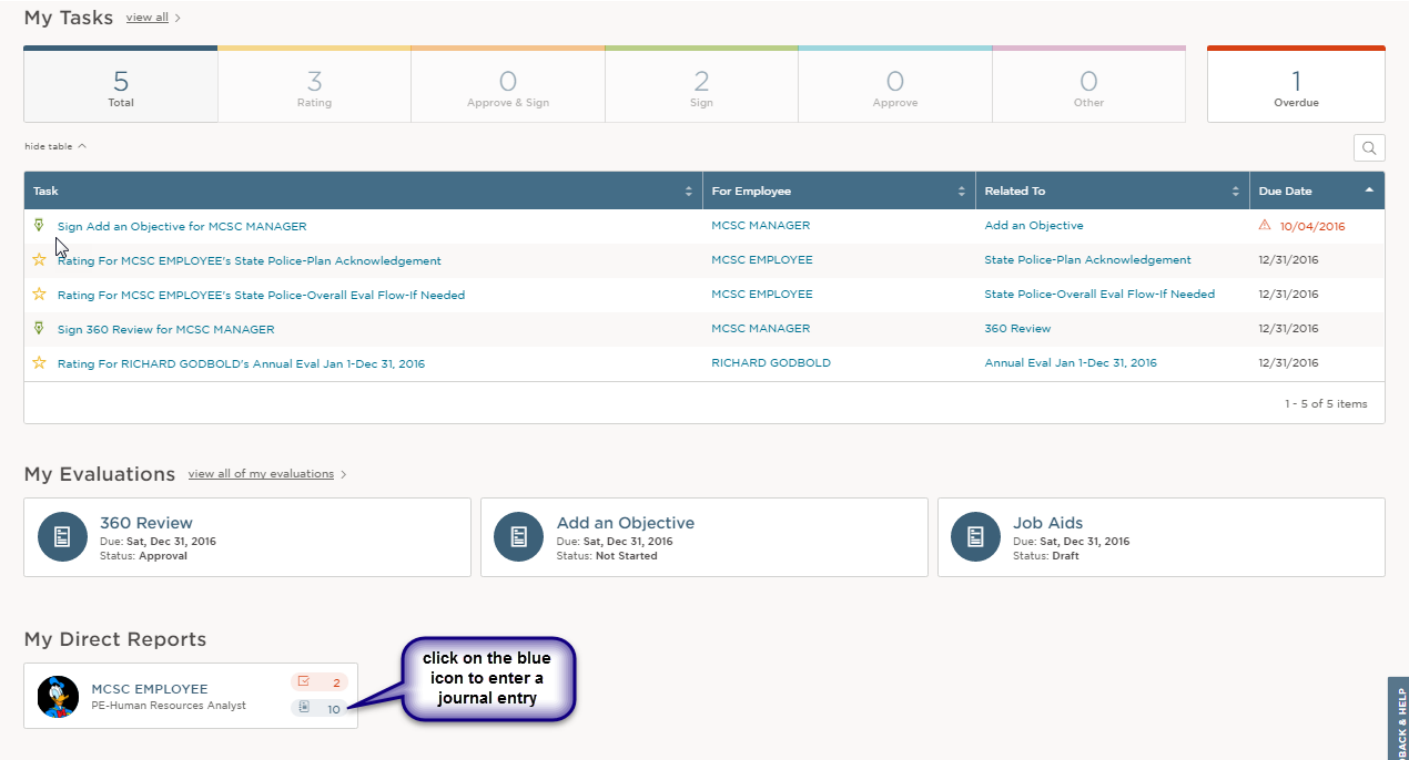


    a. A slide-out window appears. Enter and select your **name** and then **enter and format the text**. To "**tag**" an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.

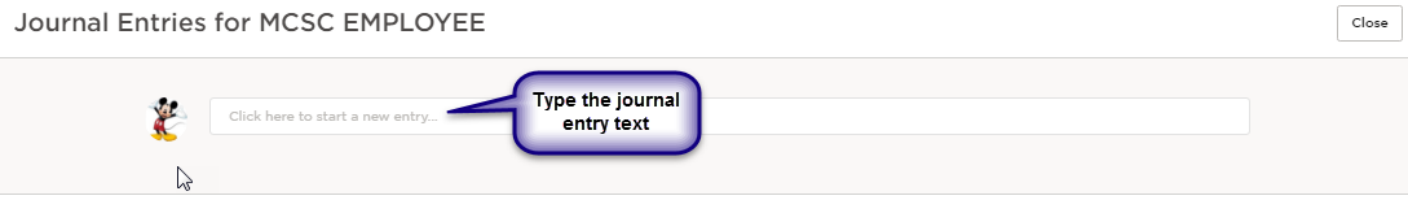


4. As a manager, to enter a journal entry for a **direct report (manager role)**, find the employee card

under Direct Reports, and click on the blue paper icon within the information card.

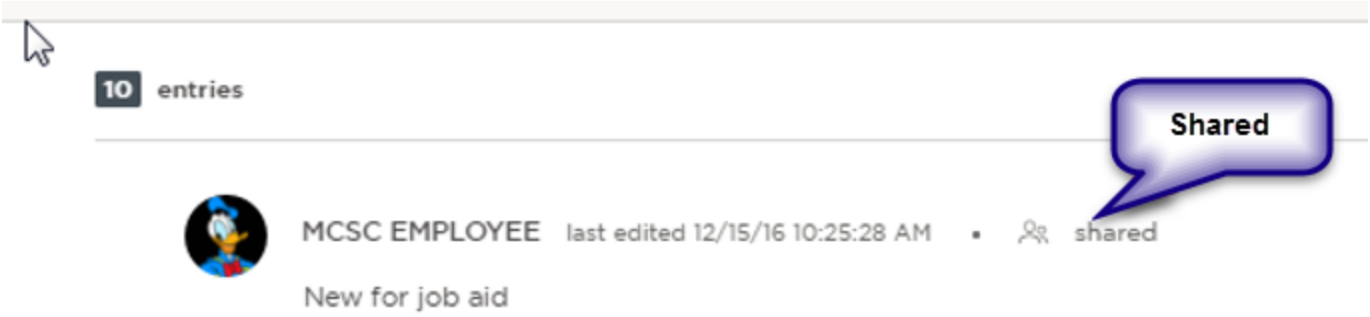


a. A slide-out window appears. Enter the **Journal Entry** text in the "click here to start a new entry…" box. Enter and format the text, then click on **Save**. To "tag" an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.



5. All journal entries created are initially private (only the creator can view them) due to default system security. The system allows for tagging of employees/managers to let them view the entry. To tag a journal entry, after creating it, click on the people icon that appears when hovering over the section. Type the name of the employee(s) you would like to tag and select them to share the entry.

6. After a journal entry is shared, the “shared” icon appears.



7. Journal entries can also be printed, or edited by the creator.

8. When finished, click on the close button to return to the Dashboard.

Employee Details

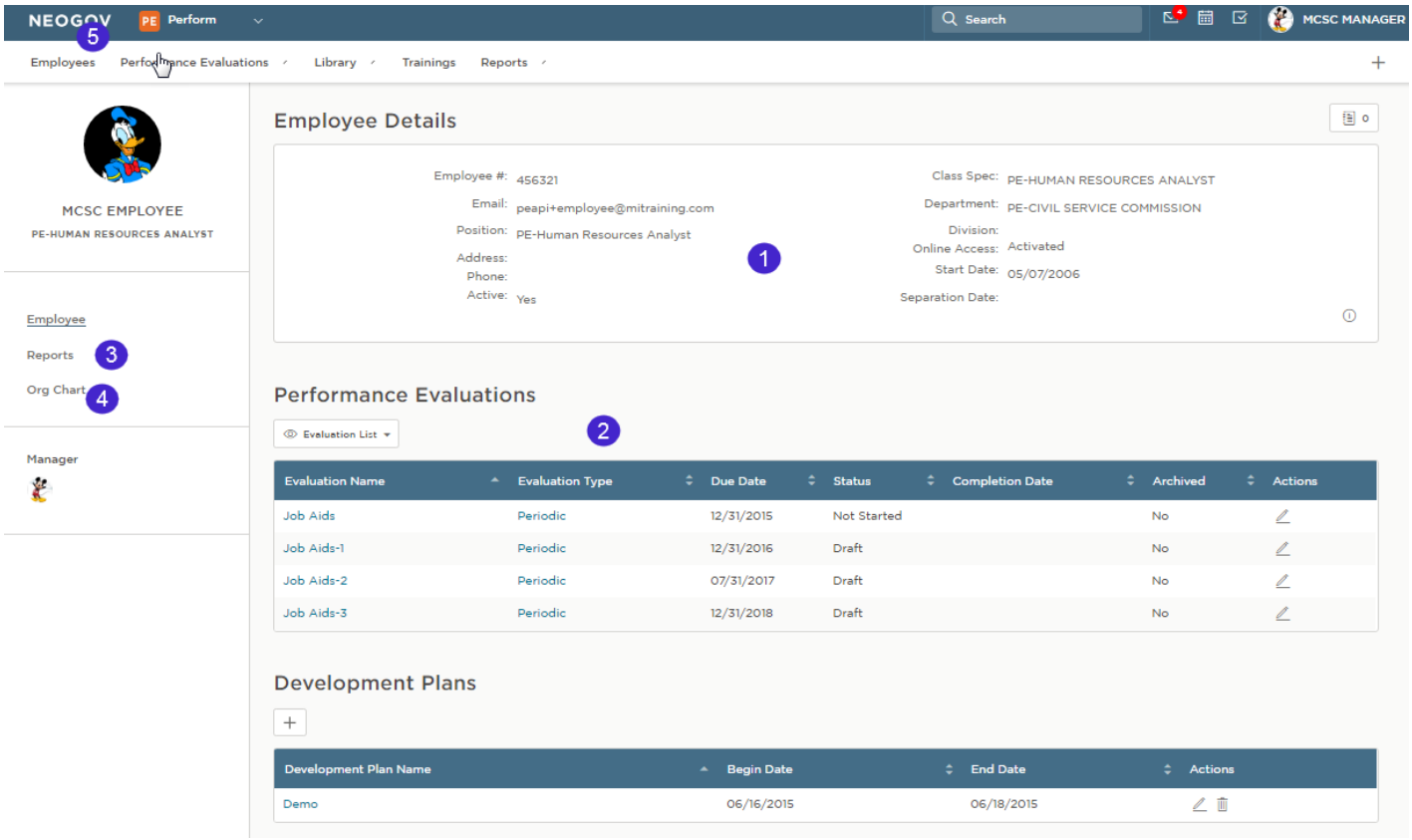
1. **Employee Details** contains employment information such as position (Civil Service classification), department, and start date.

2. This page also has your Performance Evaluation and Development Plan sections. **Performance (Plan) Evaluations** will include your current performance (evaluation) plan including the name (Job Aids in this example), type of plan (periodic or probation), and date due. **Development Plans** are not required but can be created together with your manager/manager/supervisor to track development of skills for future career growth.

3. **Reports** are available from the Employee Details page and are specific to the employee’s performance (evaluation) plan review.

4. **Org Chart** will display your organizational placement based on your reporting relationship. Clicking on the up arrow will display your manager/manager/supervisor/direct manager/supervisor. You may be able to click up through higher levels in your organization if additional arrows appear. You will only be able to **Search** on your record. These settings are controlled by security.

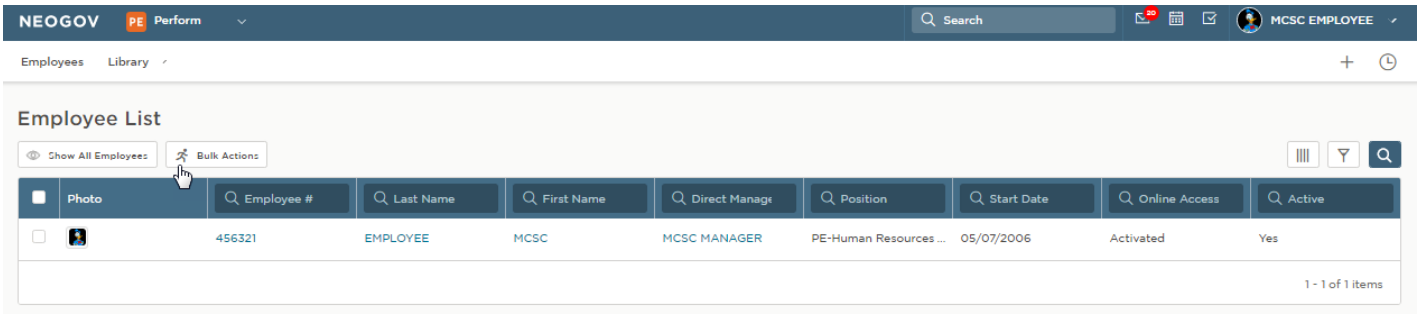
5. To return to your Dashboard, click on the **NEOGOV** logo at the top of the screen.



Menu Bar

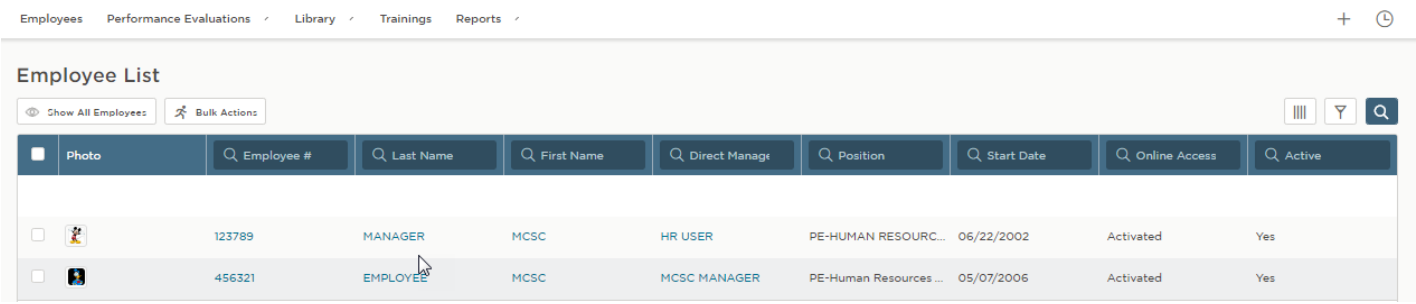
Employees

1. For an employee (who isn't a manager) the Employee List will display only your own employee record. To access your employee profile, click the first name, last name, or employee number. This will take you to the Employee Details page discussed previously in this document.



2. For an employee (who IS a manager), the **Employee List** will display your own employee record and those of your direct reports. To access a profile, click the first name, last name, or employee number.

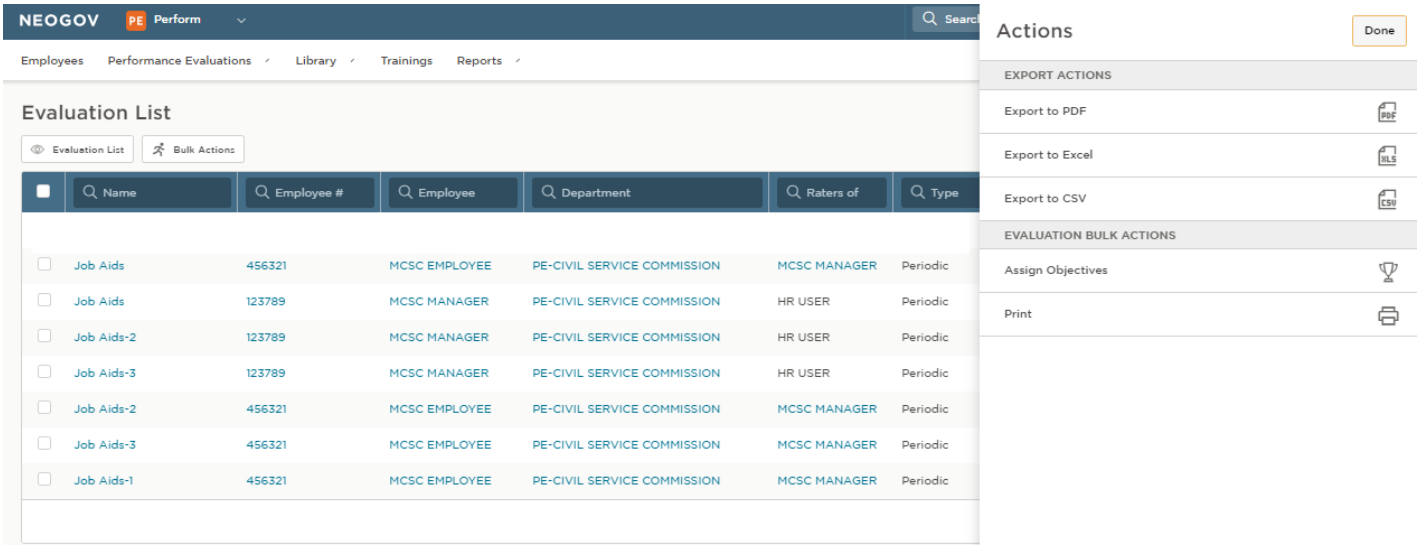
This will take you to the associated Employee Details screen.



Performance Evaluations

1. This menu option is only available to **managers** based on security settings.

2. From the **Performance Evaluation** list a manager can assign objectives in bulk, export items to Microsoft Excel, or print the selected evaluations. Assigning objectives in bulk is covered the **Bulk Objectives** section of this document.



Library

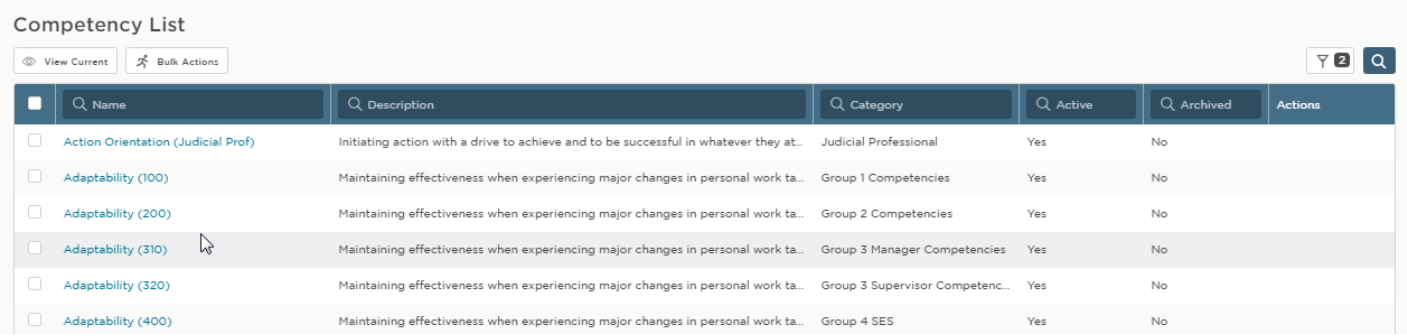
1. Department objectives will appear in the **Objective List** as they are added by departments. Objectives can be added to an evaluation using "**From Library**" which will be covered in the **Evaluation** section of this document.

2. Objectives can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.

3. The **Competency List** will display all of the State of Michigan competencies available for performance (evaluation) plans. Clicking on the name of any Competency will reveal the description, which is also

available on this screen.

4. Competencies can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.



Trainings
This menu option is only available to the Manager role, and is not used by the State of Michigan.

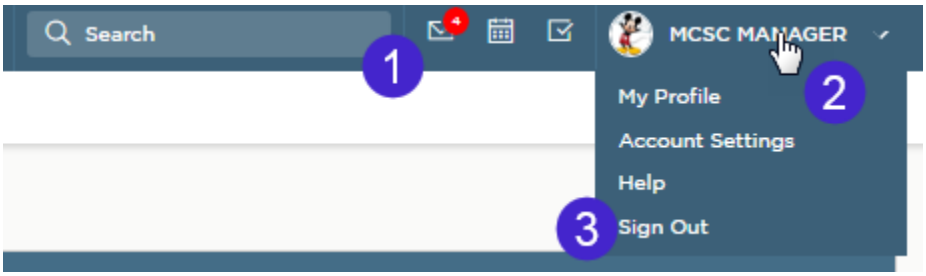
Reports
This menu option is only available to the Manager role based on configured system security. Managers have the ability to run reports on their direct reports. Reports, in detail, will be covered in the **Reports** section of this document.

Other Items

1. Also available along the upper-right of your screen is a search bar and links to your **Messages**, **Calendar**, and **Task Listing** (all specific to NEOGOV PE).

2. Further, if you hover over your **Name** a profile menu will display. This menu provides quick access to your employee profile (**My Profile**), the PE Help Center (**Help**), **Account Settings**, or **Sign-Out**.

3. To exit NEOGOV PE, click on **Sign Out**.

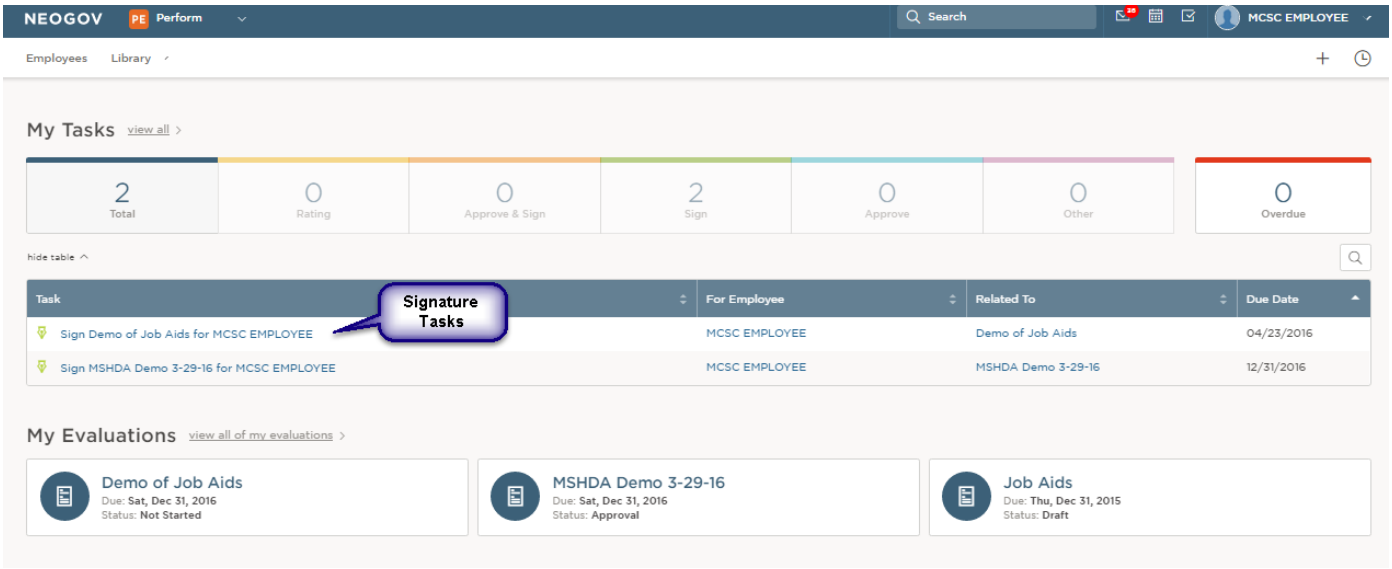


Performance Evaluation (Plan) Overview

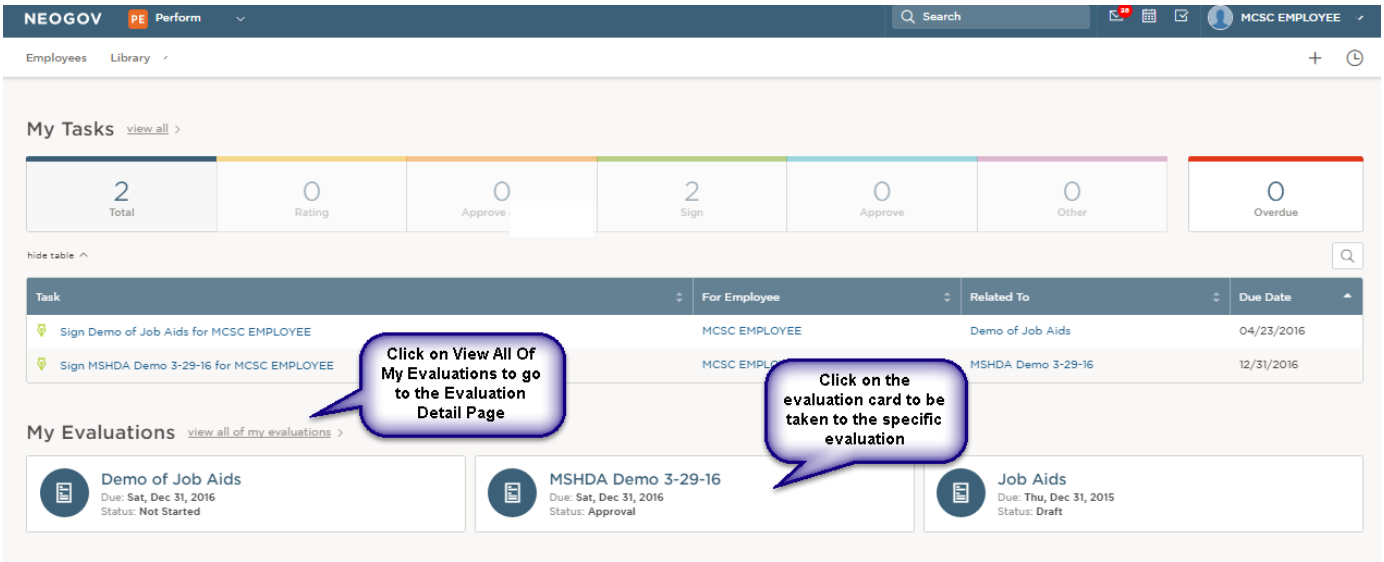
1. Employee performance (evaluation) plan templates will be established for all employees. These templates will include tasks to acknowledge the plan and ratings. In addition to the acknowledgement tasks, these templates may also include tasks to self-rate your own plan. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the "current" view of the **My Tasks** section on the dashboard.

   NOTE: The **acknowledgement tasks** will not populate in the **tasks section** of the dashboard until the

performance (evaluation) plan has been started/made ready for review (published) by your manager/supervisor and the evaluation/plan is at the associated step. How to acknowledge a performance (evaluation) plan/rating is covered in the **Acknowledgement of Plan and Acknowledgement of Rating sections** of this document.

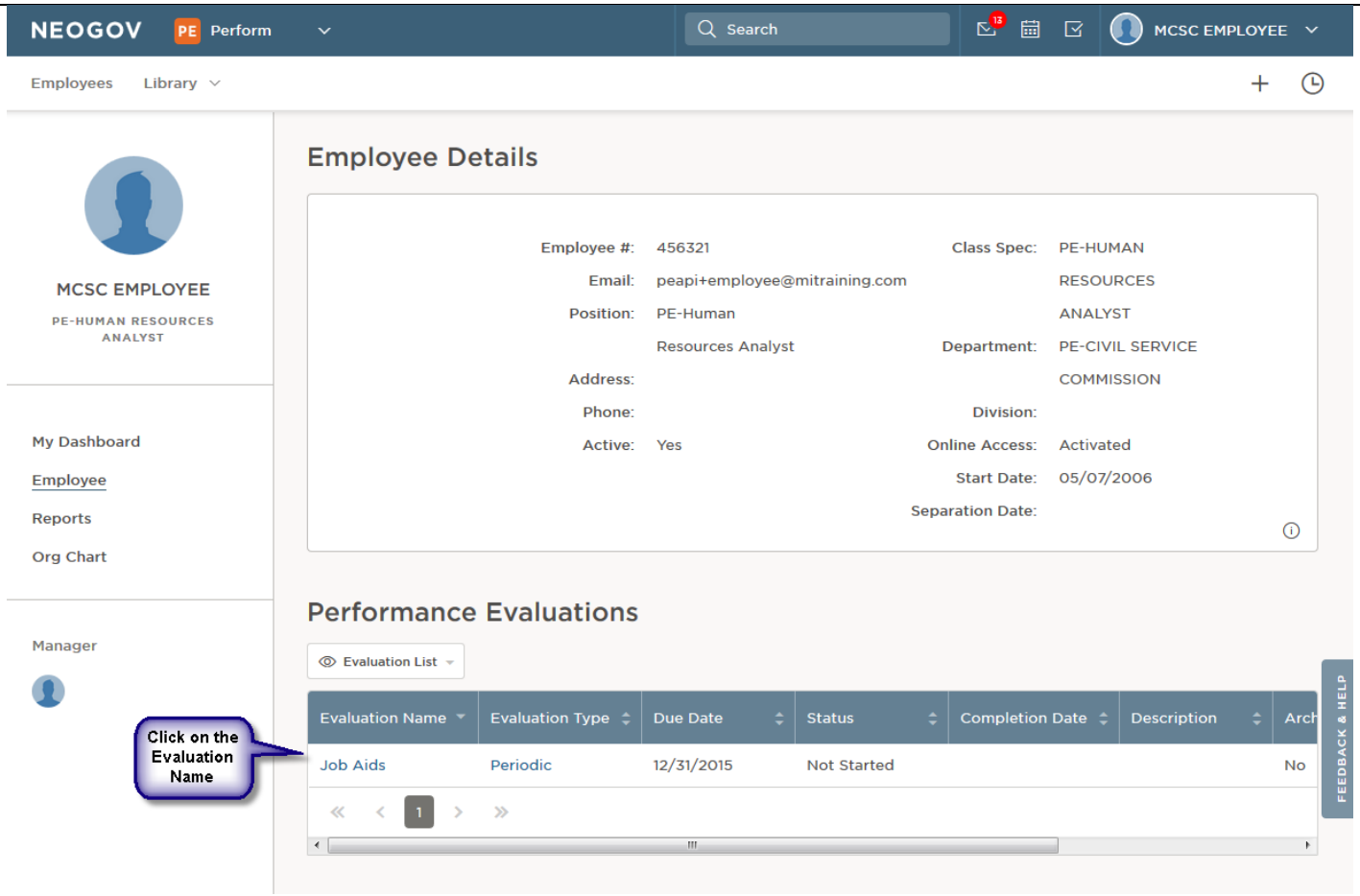


2. Click on the link for **View All of My Evaluations** or the **Evaluation Card** displaying on the dashboard. Note: Only the most recent 3 evaluations will display as evaluation cards on the dashboard. They are sorted by due date in descending order.



3. Clicking on the **Evaluation Card** will take you directly to the related **Evaluation Details page**. Clicking on **View All of My Evaluations** will take you to the **Employee Details** page where the performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.

4. From the **Employee Details page**, click on the plan (evaluation) name.



5. The **Evaluation Detail** page lists information specific to your performance (evaluation) plan including name, type (periodic or probation), your name, position, and department/division.

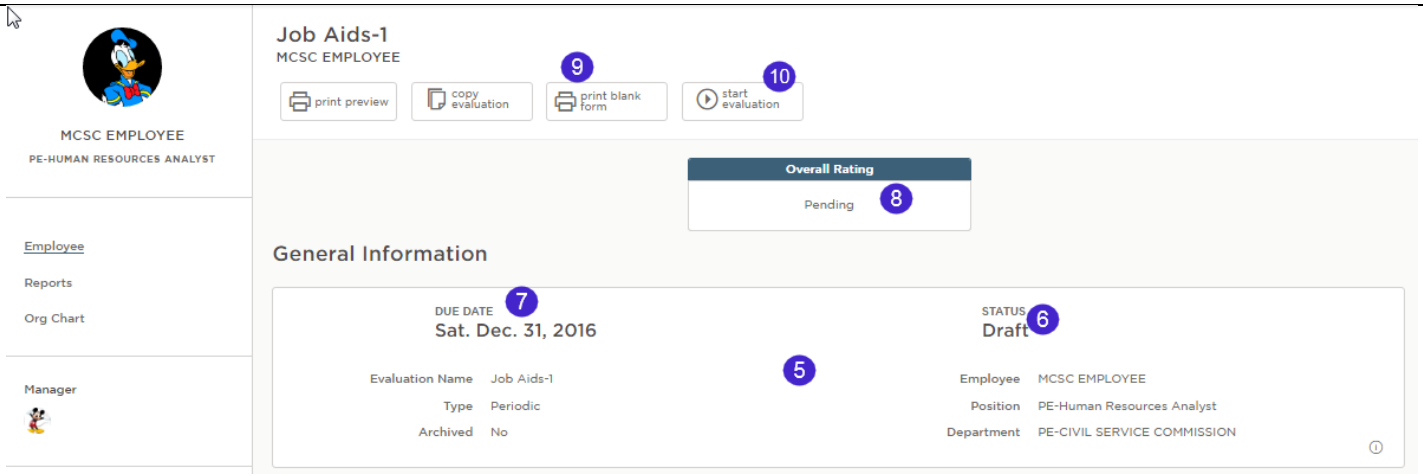
6. The performance (evaluation) plan template will be in **Draft Status** upon receipt and will remain in that status until it is started/ready for review (published).

7. Most agencies have established performance (evaluation) plan dates. The dates you receive will reflect the established dates for your agency or organizational unit including the **Due Date**. (Probationary plans will be covered in a separate module.)

8. The **Overall Rating** will display as Pending until the performance (evaluation) plan review has been completed.

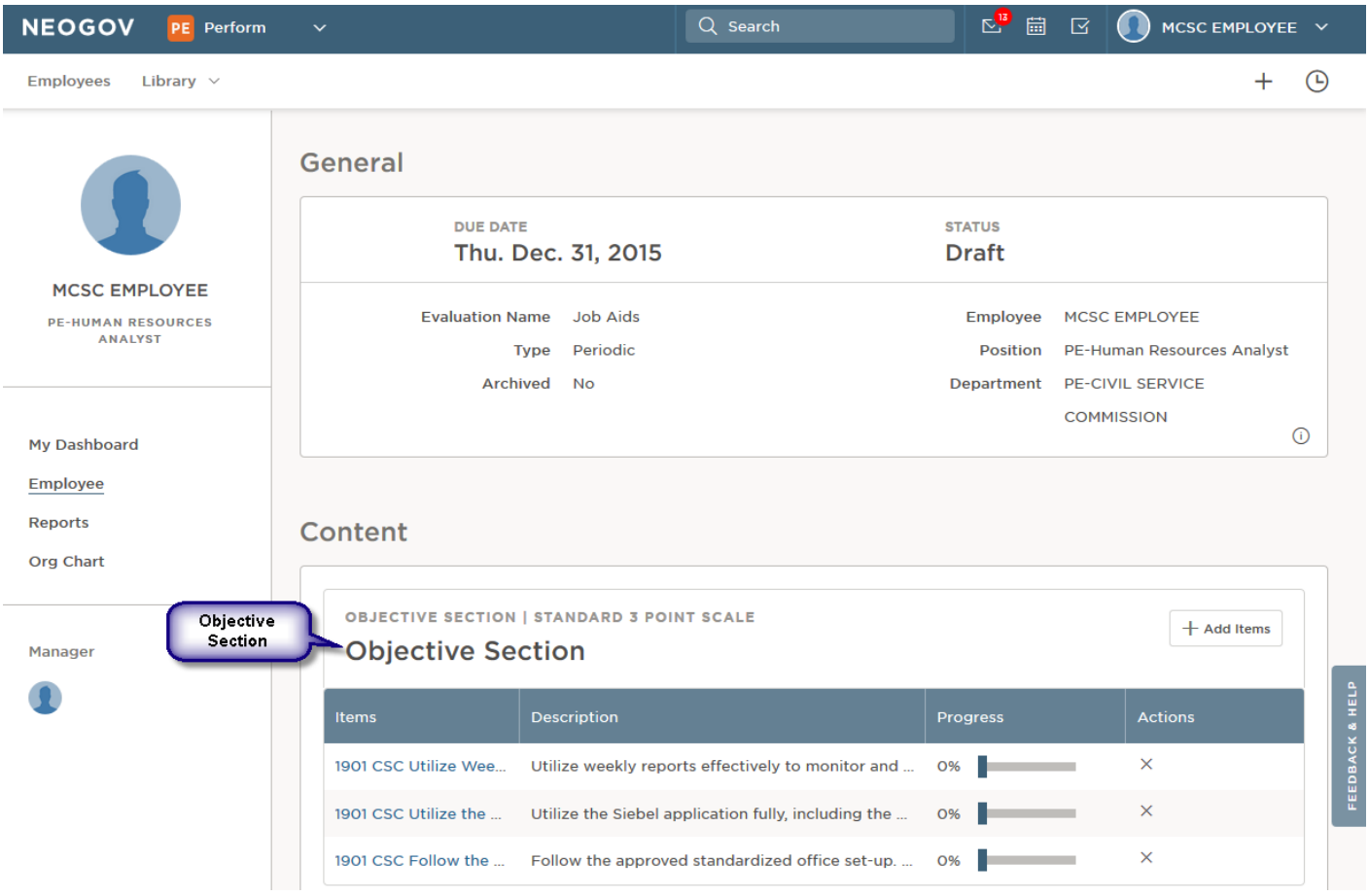
9. If your agency is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.

10. Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started/made the plan ready for review (published it).



11. **Objectives** - These are the individual actions that the Manager/Supervisor and employee agree the employee will be rated on in this performance (evaluation) plan for this rating period. Objectives should be SMART (Specific, Measureable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating, or understanding SMART objectives.

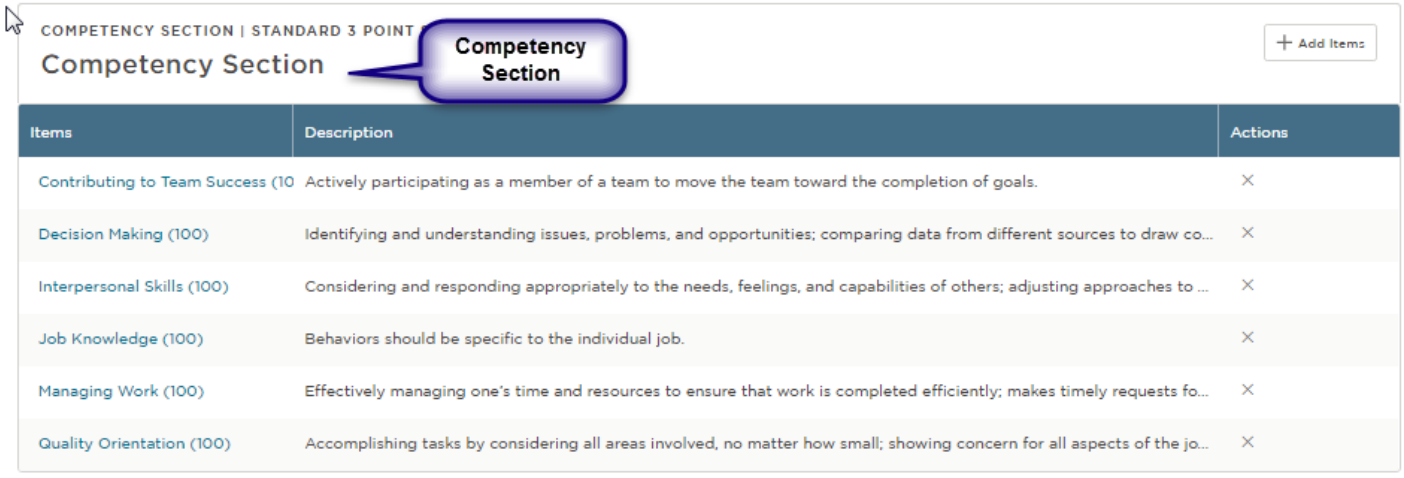
12. Employees/Managers can add objectives (and edit/delete those they add) until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the addition of objectives. Other Managers/Supervisors may complete all of the plan updates in PE.



13. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable

Classification Plan) Group.

14. Employees/Managers can add/delete competencies until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the deletion or addition of competencies. Other Managers/Supervisors may complete all the plan updates in PE.

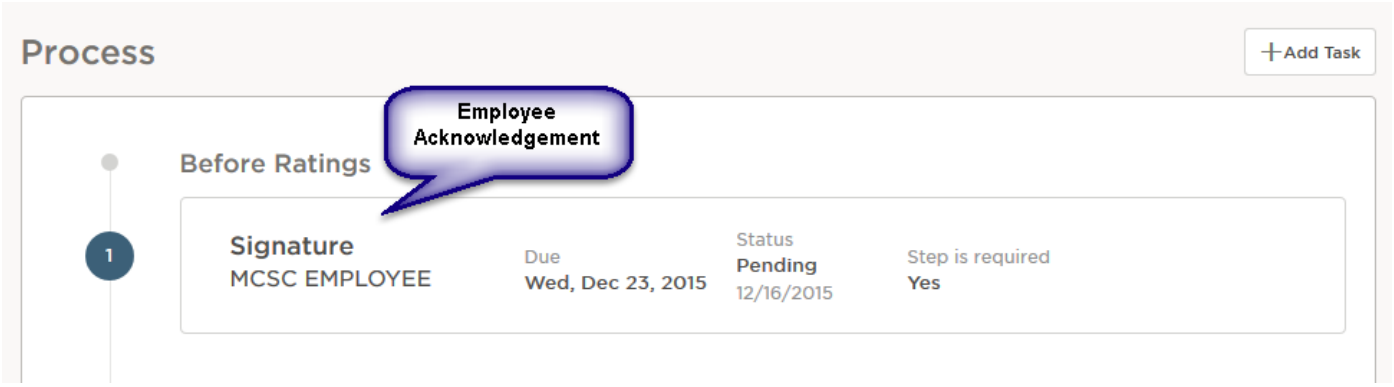


15. Notes/Attachments can be added within the evaluation with items specific to the rating period.

16. **The Process Timeline portion of the performance (evaluation) plan includes the following:**

    a. **Plan (evaluation) Acknowledgements** are defaulted via the performance (evaluation) plan template. The acknowledgement is used to have an employee and/or manager certify that they have seen and reviewed the objectives and competencies assigned in the performance (evaluation) plan that will be used for the current rating period.

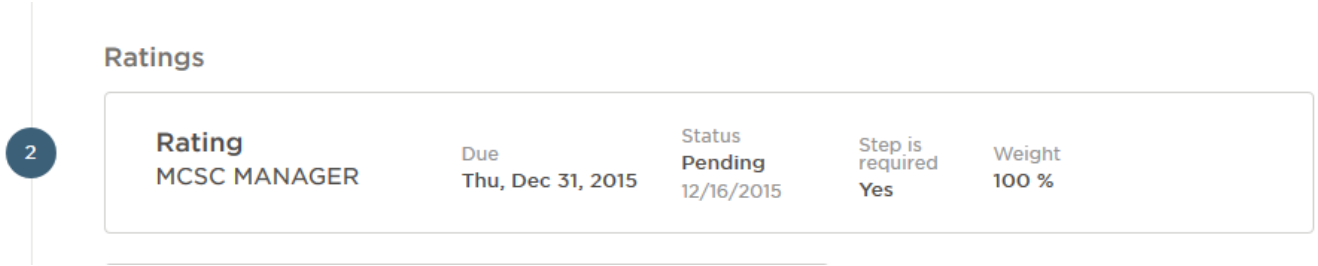
    NOTE: The plan acknowledgement task is not available to an employee until the performance evaluation is started/ready for review (published). How to acknowledge a performance (evaluation) plan is covered the **Acknowledgement of Plan section** of this document.



b. Self/Peer Ratings can be used to assign a self/peer rating to the performance (evaluation) plan. This is typically assigned within the performance (evaluation) plan template. Please contact your HR Office to have self/peer ratings added to the plan.

c. The **Rating of Record** is assigned on the performance (evaluation) plan template. Employees *may* be required to conduct a self-rating before the performance (evaluation) plan due date.

NOTE: The manager/supervisor is required to rate the employee before the performance (evaluation) plan due date. The manager/supervisor rating due date in the example below is 12/31/2015. The manager/supervisor serves as the **Rater of Record**.



d. The **Rating Acknowledgements** are defaulted via the performance (evaluation) plan template. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance (evaluation) plan rating for the current rating period. How to acknowledge a performance rating is covered in the **Acknowledgement of Rating section** of this document.

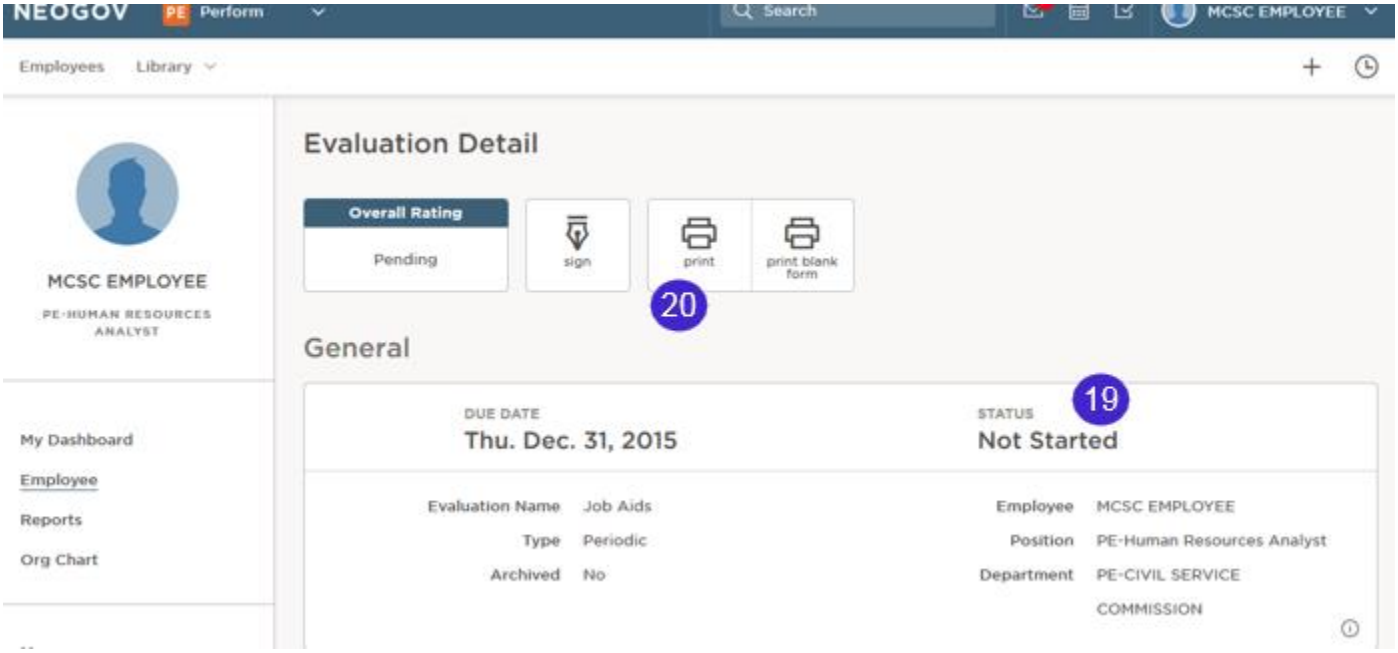
e. Tasks can be added to the performance (evaluation) plan and will be covered in the Notes/Attachments/Tasks section of this document.

17. When the performance (evaluation) plan is complete, the Manager/Supervisor will start/make the evaluation ready for review (publish). Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status). This will be covered in more detail in the **Edit/Start Performance (Evaluation) Plan** section of this document.

18. After the performance (evaluation) plan is started/ready for review (published), an email is sent to regarding the **Acknowledgement of Plan**. After the acknowledgment of the plan (if additional acknowledgements are not required), a **Rate** star appears for the manager meaning that the plan is available for rating. (a rate star will only populate for the employee if a self-rating is assigned to the evaluation).

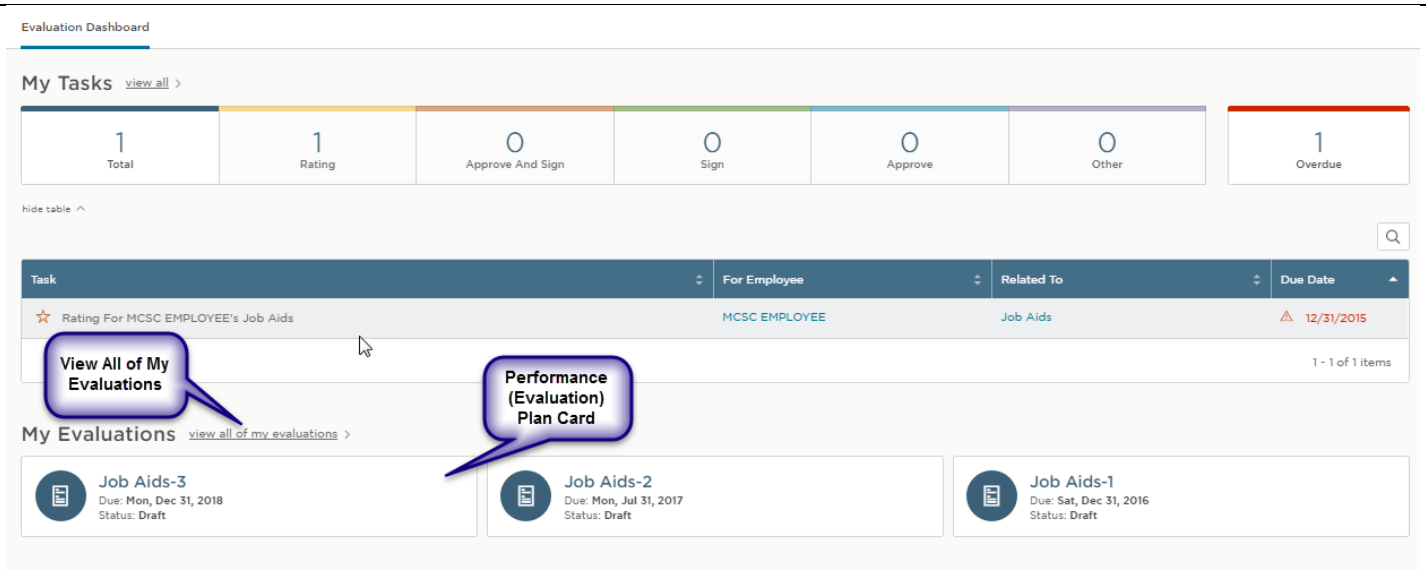
19. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.

20. The performance (evaluation) plan can now be printed using the **Print** feature.

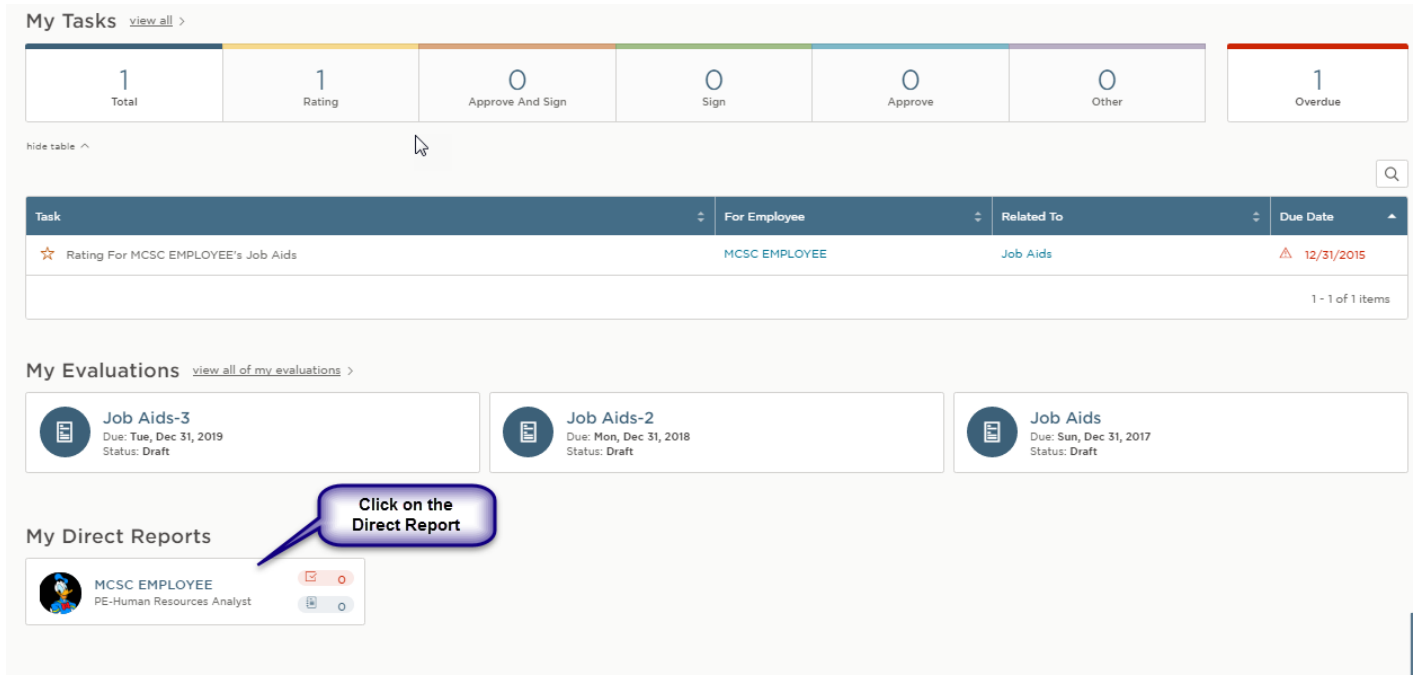


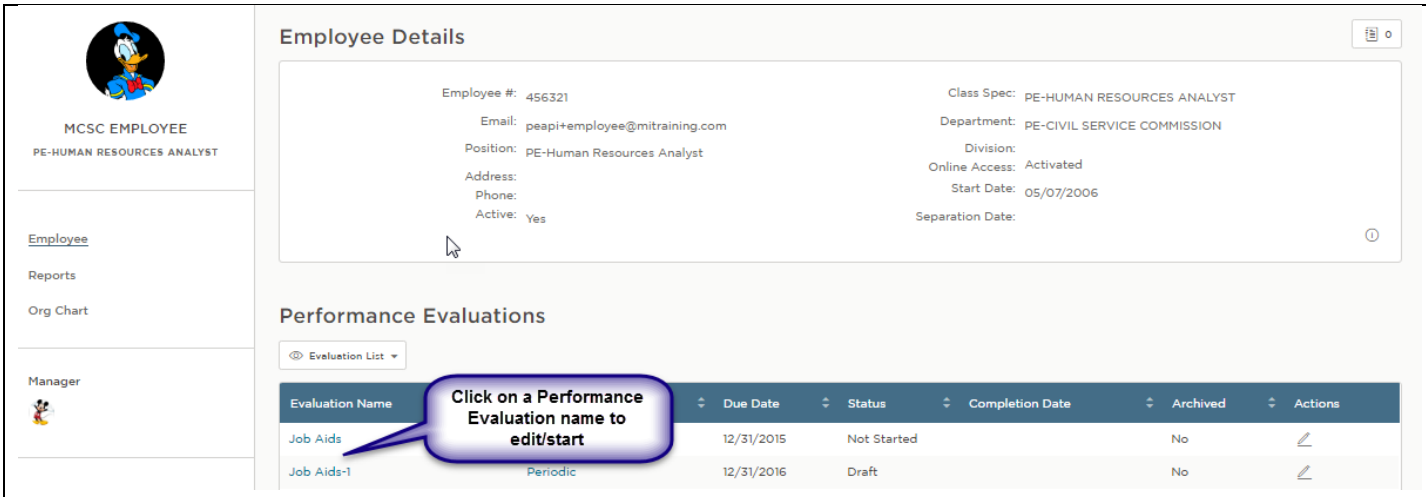
Edit/Start Performance (Evaluation) Plan

1. After you log in, from the **My Dashboard** screen one of the following will apply:
    a. **Employee**—Click on the **performance (evaluation) plan card** that you wish to view/edit, which will take you directly to the related **Evaluations Details** page. Or, click on the link **View All of My Evaluations**. This will take you to the **Employee Details** page where the performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.



b. **Manager**—Click on the direct report whose performance (evaluation) plan you wish to view/edit/start. In doing so, you will be taken to your direct report's **Employee Details page** (covered in the Overview of NEOGOV PE) where you can select the **Performance (Evaluation) Plan** to edit/start.

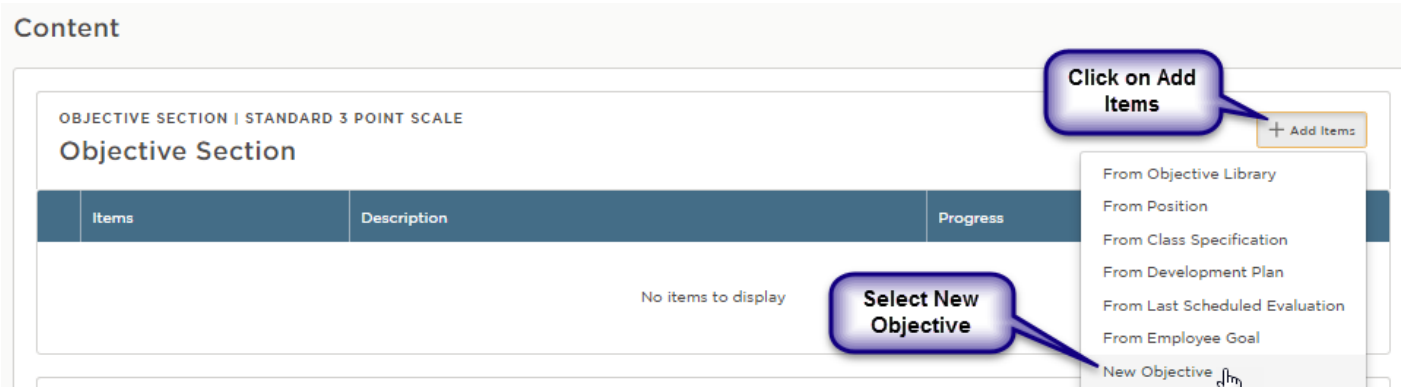




Objectives

1. On the **Evaluations Details page**, to **add objectives** to the plan, click on **Add Items** and select **New Objective**. (Department strategic objectives will be available From Library. If your department is using this functionality, you will be instructed on what to select from the library. **The State of Michigan is ONLY using From Objective Library and New Objective at this time**)

   NOTE: Employees can edit/add/delete objectives until the performance (evaluation) plan is started/ready for review (published)

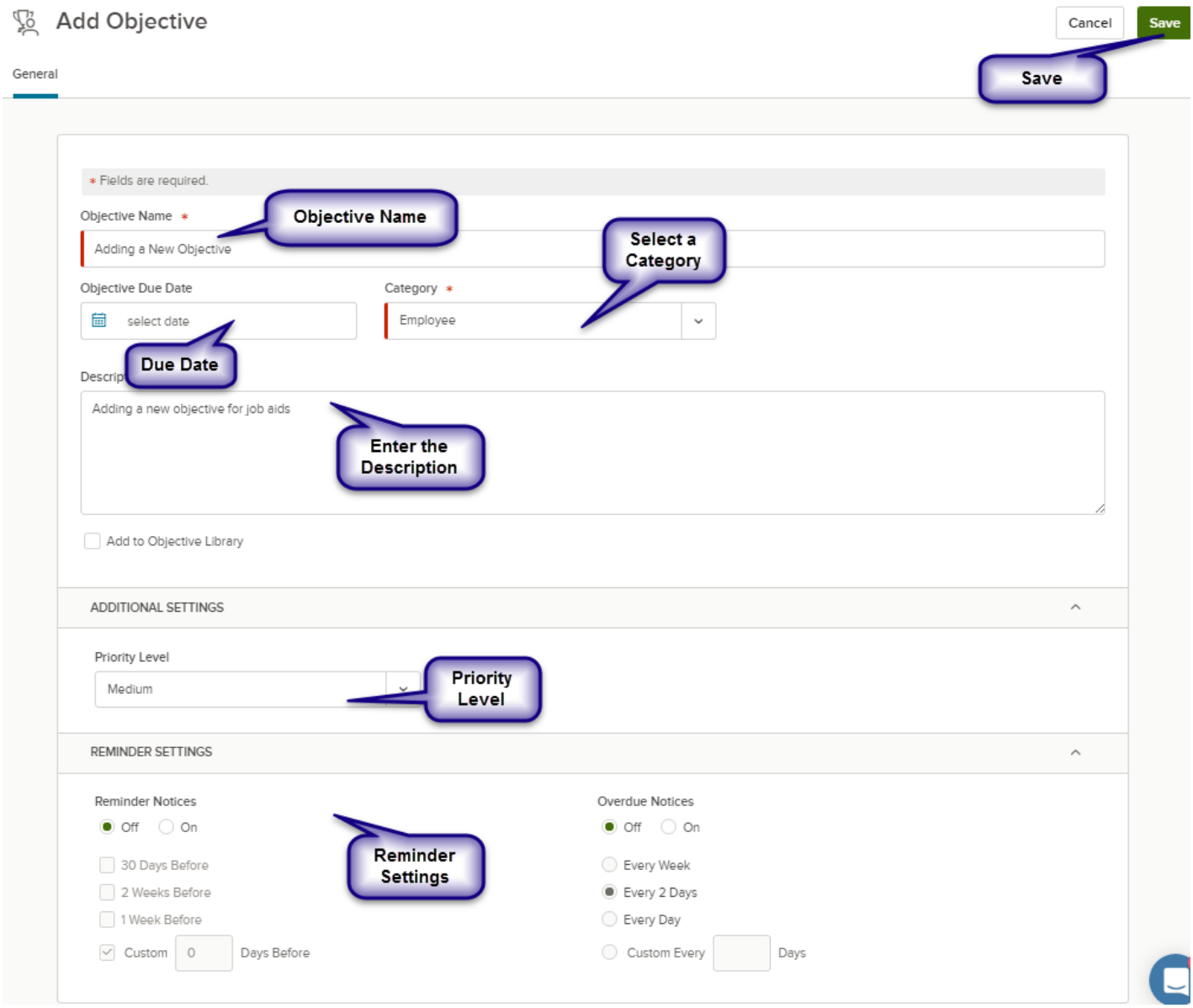


2. The Add Objective slide out will open. Add the **Objective Title** in the **Objective Name Field.** Enter a due date if desired (it's not required), add a **Description** to ensure both the employee and manager/supervisor are clear on what the objective is intended to achieve and how it will be measured. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Under the additional settings tab, a **priority** can be selected. **Reminder settings** can also be set.

   Objective Categories are outlined below:

   - Department Plan objectives are associated with the department's strategic plan, mission, vision, etc.
   - Strategic Plan objectives are associated with the strategic plan, initiatives, projects, business plan, etc.
   - Employee objectives are associated with the employee's activities for the review (evaluation)

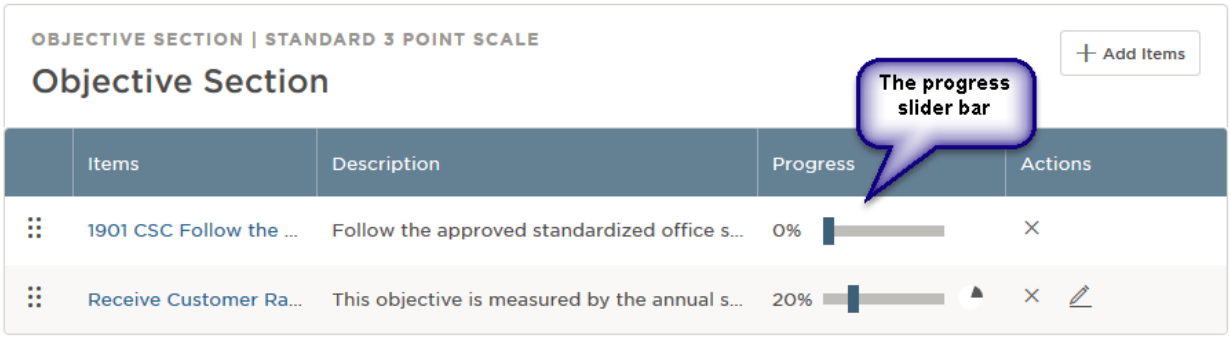
period.



3. Click on **Save**

4. Repeat these steps for all additional objectives.

5. Each objective is accompanied by a **Progress** slider bar, which may used to update the percentage complete for that objective. Reports may also be run on this information. (The slider bar appears on the **Evaluation Details page** in the Objectives section.)



6. To **Edit** an **Objective** click on the pencil icon.

   NOTE: Only the creator of the objective can edit it. Objectives added as "New Objectives" can be edited (Objectives added from the Library are not editable).

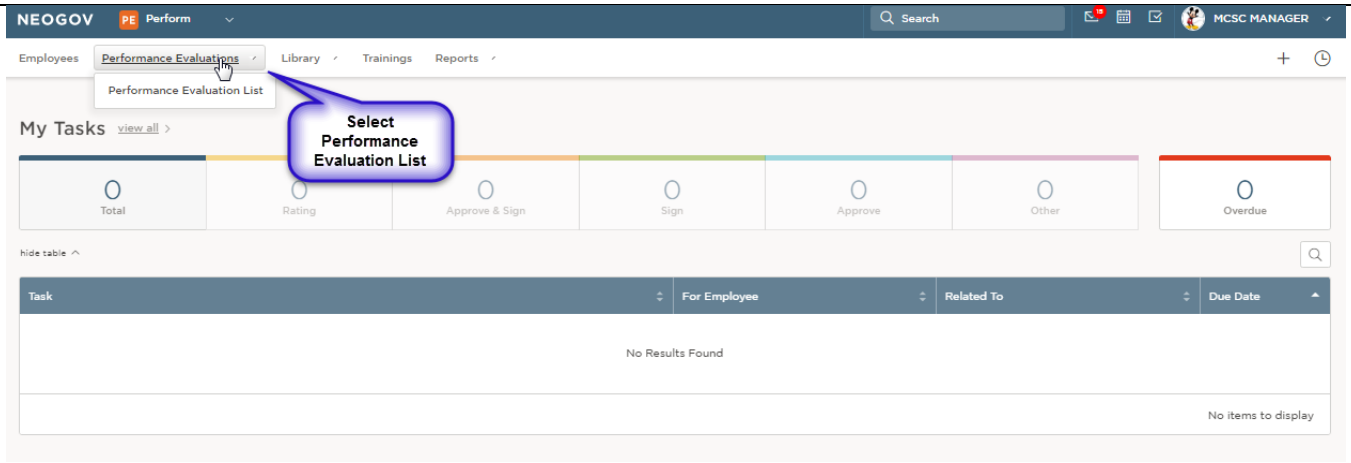
7. To **delete** an objective, click on the "**X**" icon in the Actions column. The system will prompt you to confirm the deletion of the objective.

Bulk Objectives

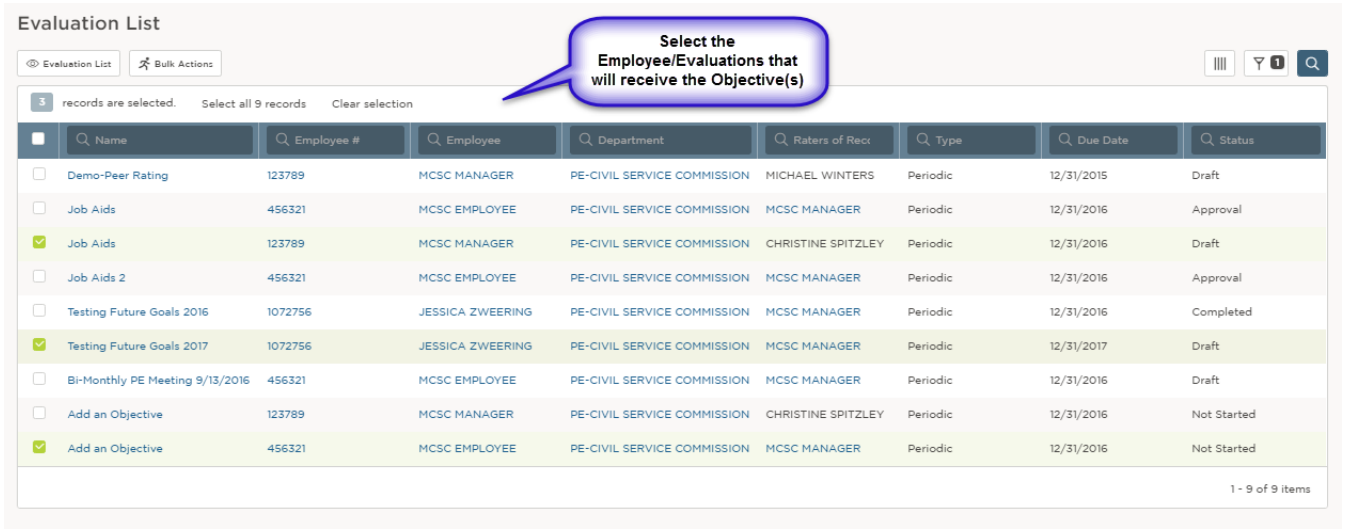
If you are a **Manager**, the ability to add an objective to multiple employees at the same time is available using a **bulk tool**.

1. In the **Performance Evaluations** menu, select **Performance Evaluation List**.

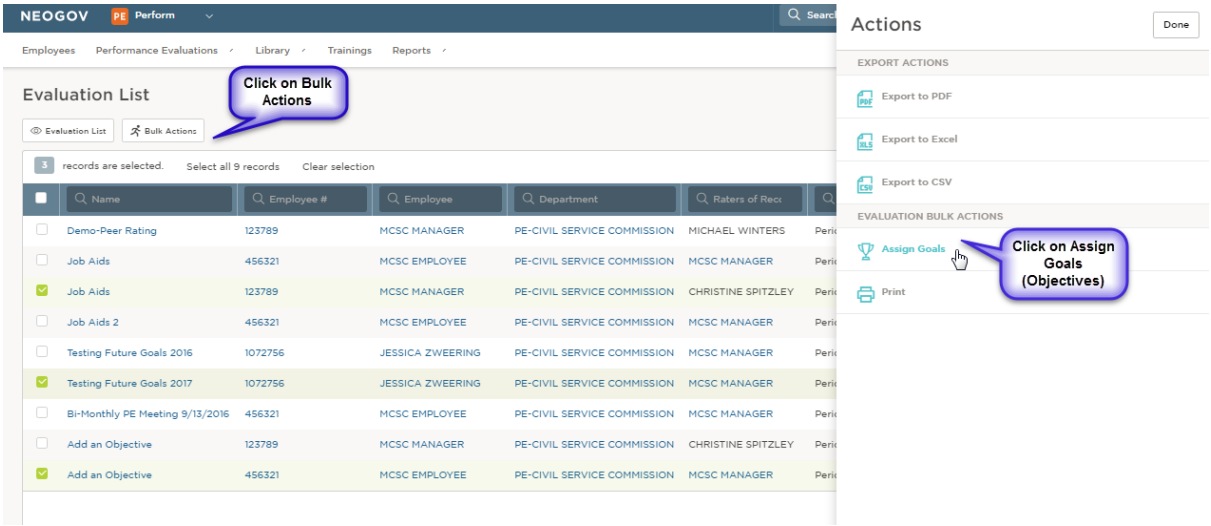
   The **Evaluation List** will populate based on system security, displaying only the direct reports associated to the manager.



2. On the **Evaluation List**, select the employees/evaluations that will receive the objective(s). Objectives can be added to evaluations in **Draft** and **Not Started** status only.

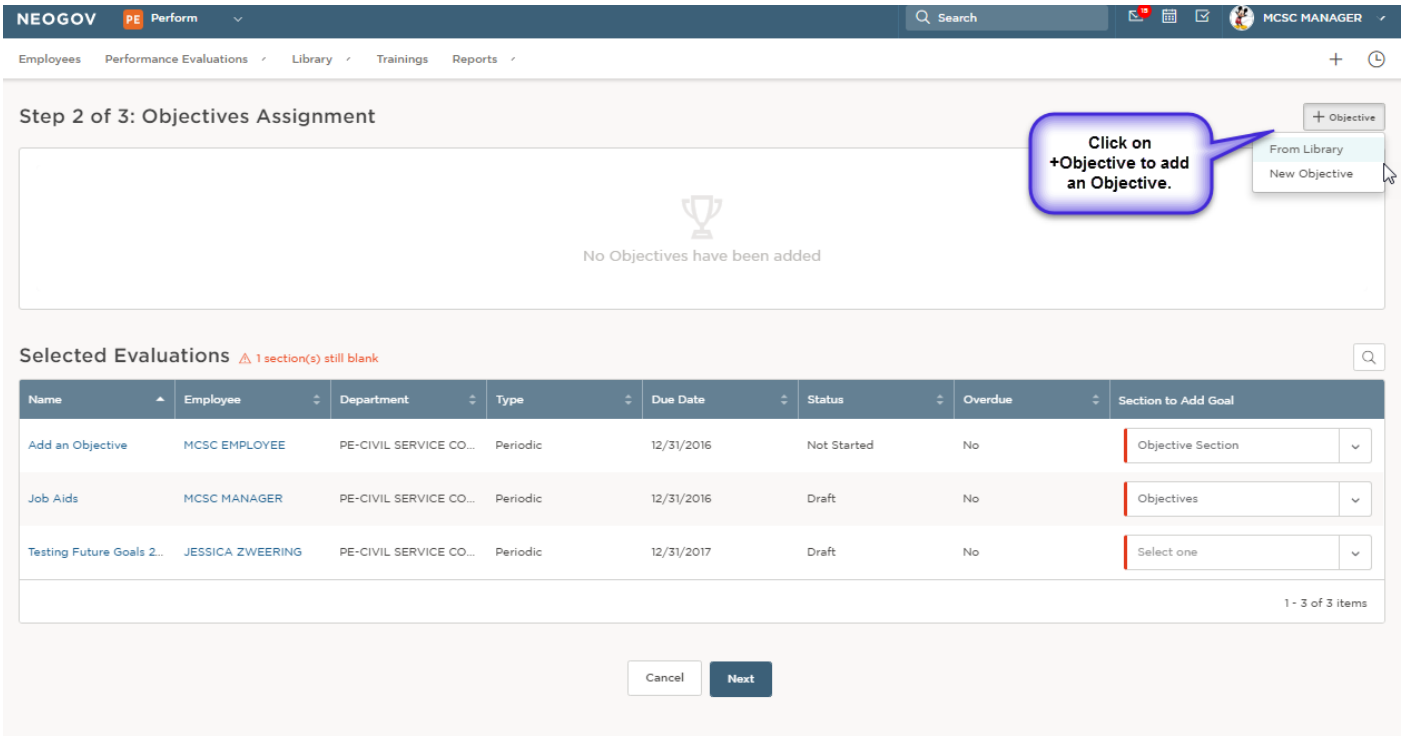


3. Click on the **Bulk Actions button**. **Select Assign Goals (Objectives)** from the Evaluation Bulk Actions section.

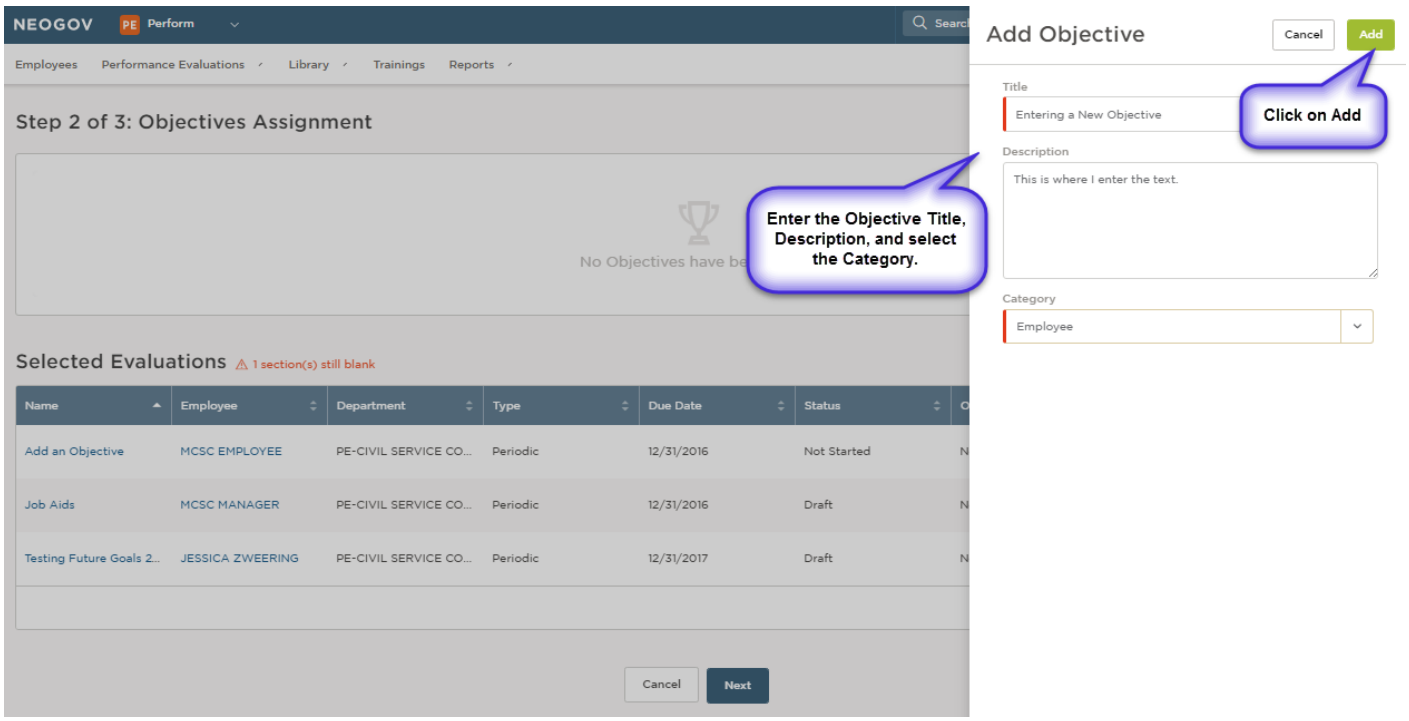


4. On the **Objectives Assignment** page, click on the **+Objective** button to add the Objective. **From**

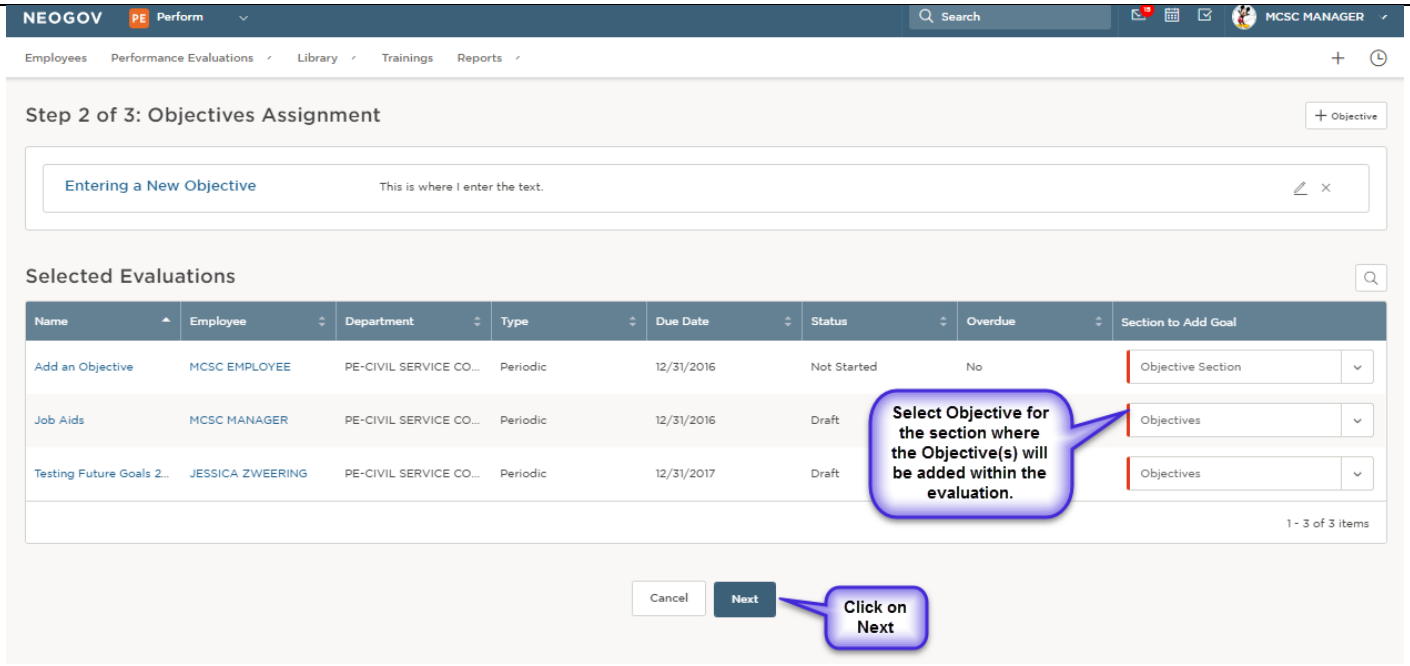
Library allows for the assignment of existing Objectives housed in the Objective Library. **New Objective** allows for the creation of a new Objective.



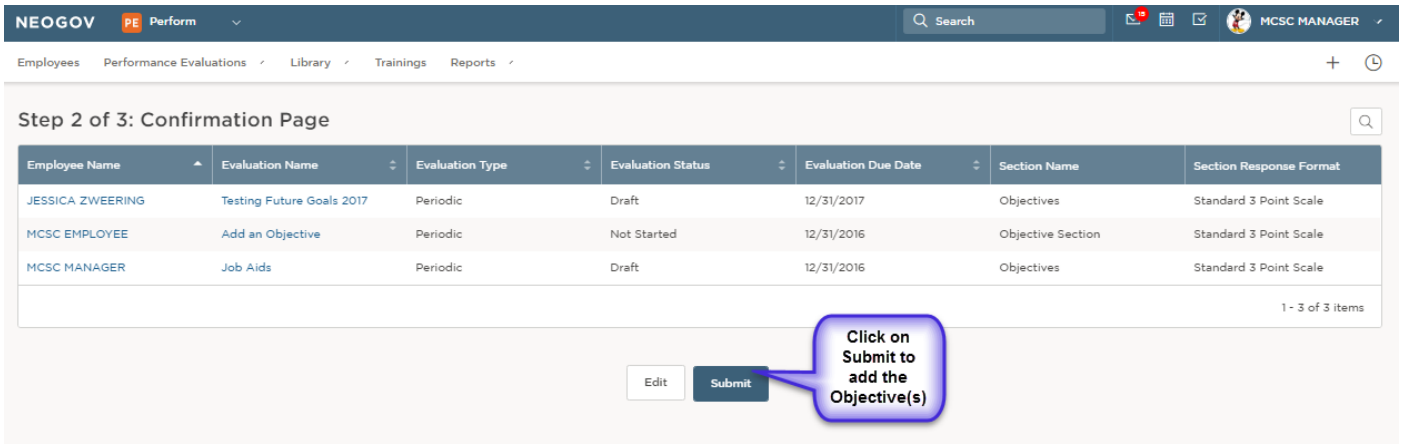
5. Enter the **Objective Title, Description**, and select a **Category** (usually Employee). When finished, **click on Add**.



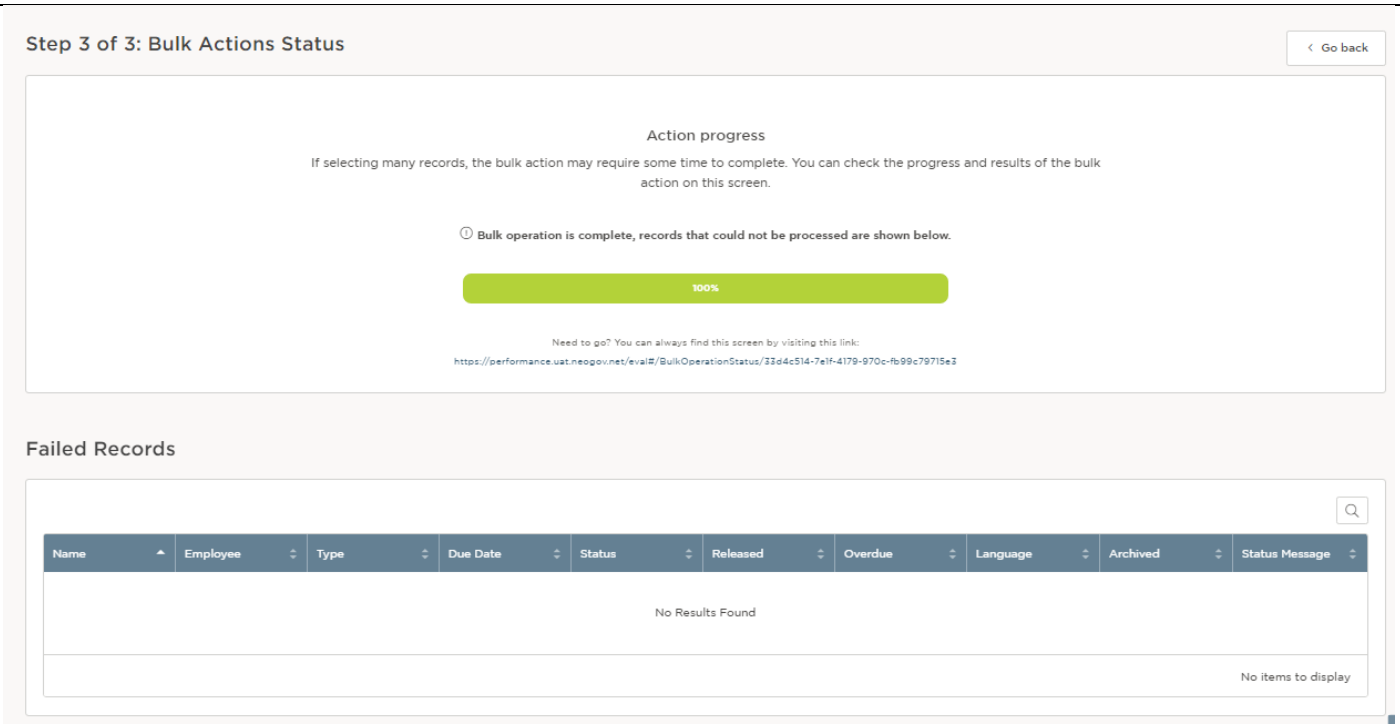
6. Enter any additional Objectives that should be added to the selected employees via the bulk action tool. When finished, select **Objective** for the section where the Objective(s) will be added within the evaluation. Click on **Next**.



7. On the Confirmation page, review the data and click on **Submit** to add the Objective(s).



8. A confirmation page will display when the action is complete.



Competencies

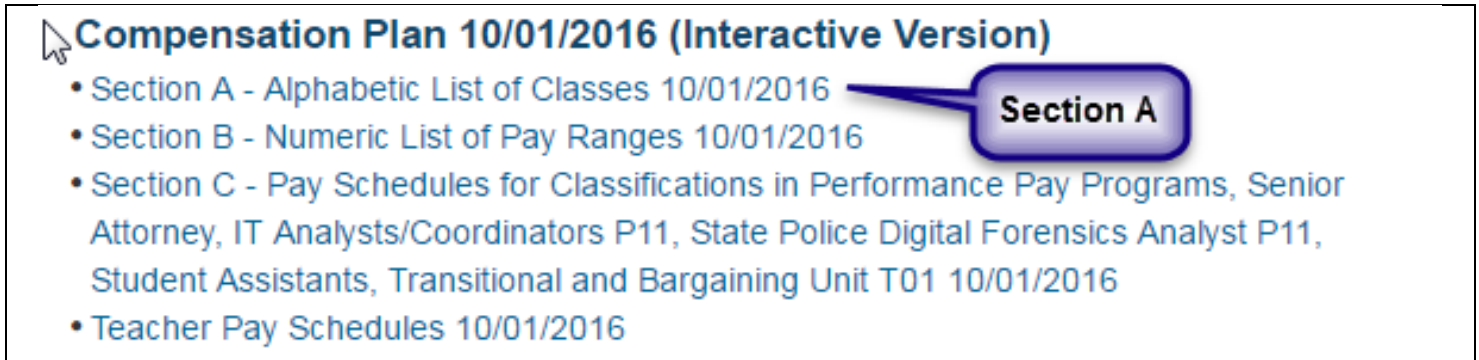
1. On the **Evaluations Details page**, to add **Competencies** to the evaluation (plan), click on **Add Items** and select **From Library** or **From Class Specification**.

   NOTE: **From Library** allows you to select the competencies to add. **From Class Specification** adds every competency from the ECP Group to the section.

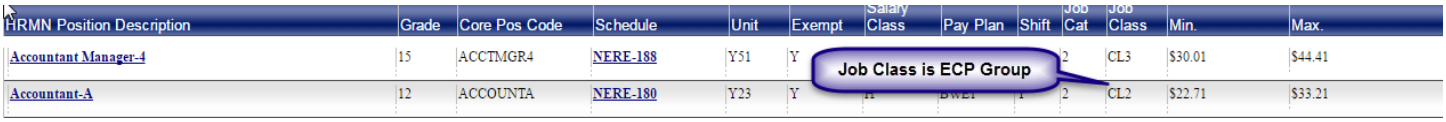
   NOTE: Employees can add/delete competencies until the performance (evaluation) plan is started/ready for review (published).

2. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable Classification Plan) Group. If you do not know your Group, you can find the information in the Compensation Manual. The Compensation Manual is available on the Civil Service Commission (intranet) Insider under Top 10 Links or on the Civil Service Commission home page (internet) under MCSC Quick Links.

3. **Click on Section A** in the Compensation Manual.



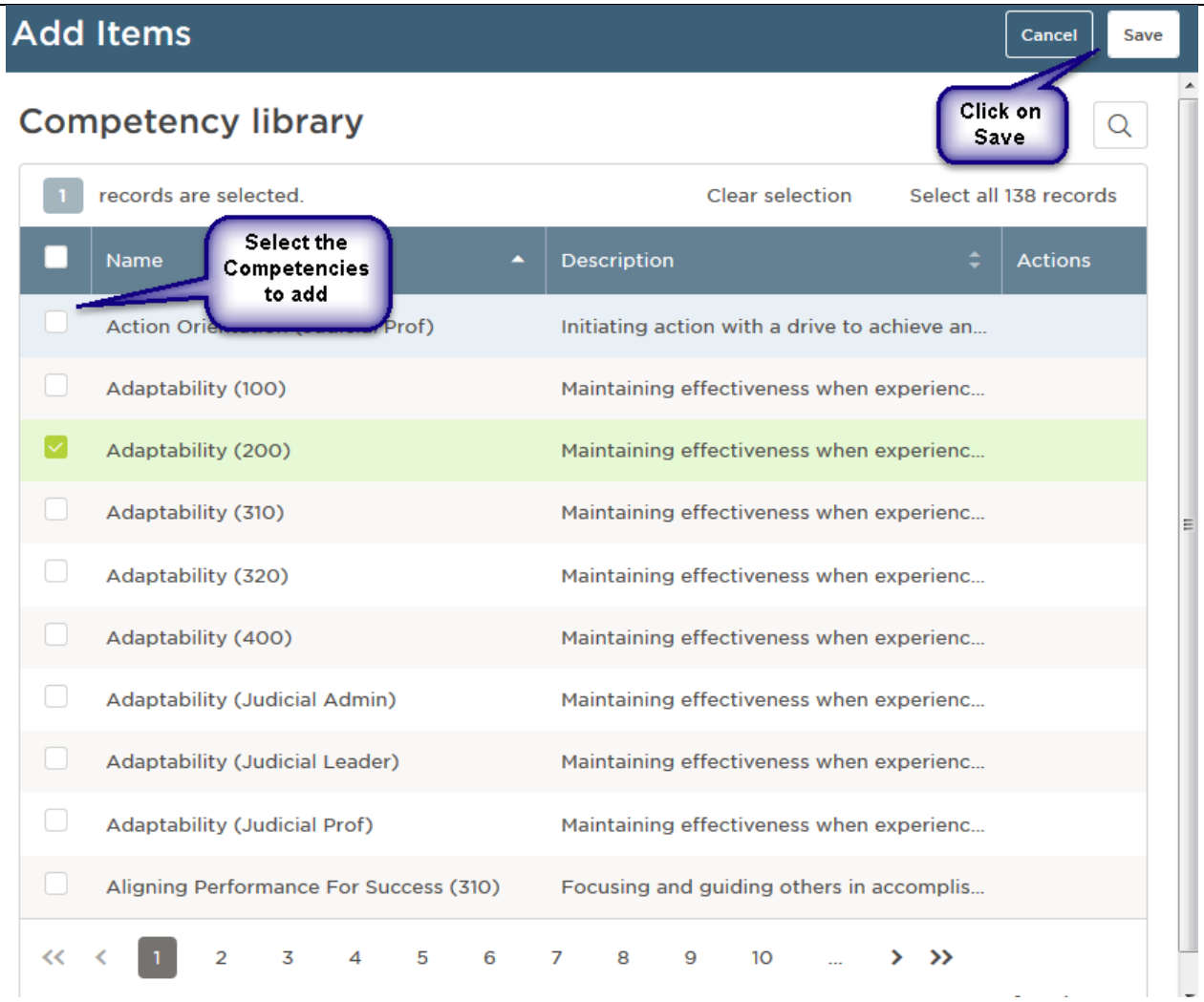
4. Locate your **HRMN Position Description** (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager and a Group 3 Supervisor); CL4 is Group 4.



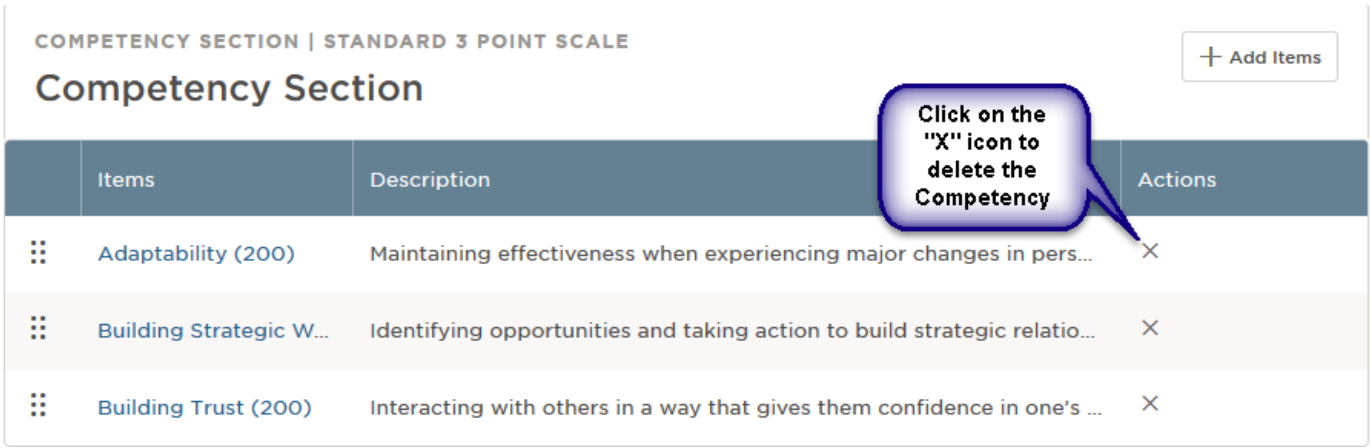
5. Select the appropriate competency by clicking in the checkbox in front of it and selecting **Save**.

   NOTE: Competencies are entered in NEOGOV PE with (100), (200), (310), (320), or (400) after them. The following applies:

   - Group 1 competencies are followed by (100)
   - Group 2 competencies are followed by (200)
   - Group 3 MGR competencies are followed by (310)
   - Group 3 SPV competencies are followed by (320)
   - Group 4 competencies are followed by (400)



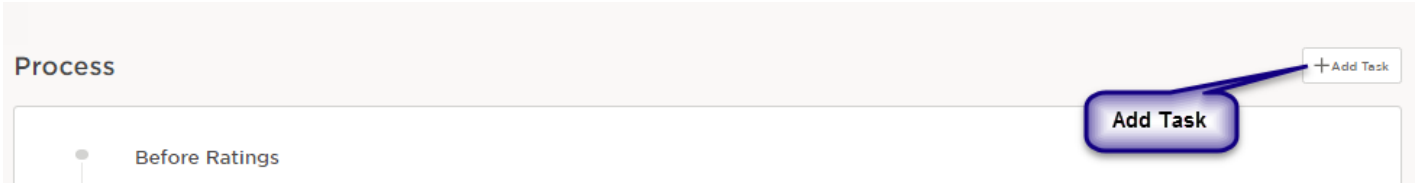
6. To **delete** a competency click on the **"x" icon**.



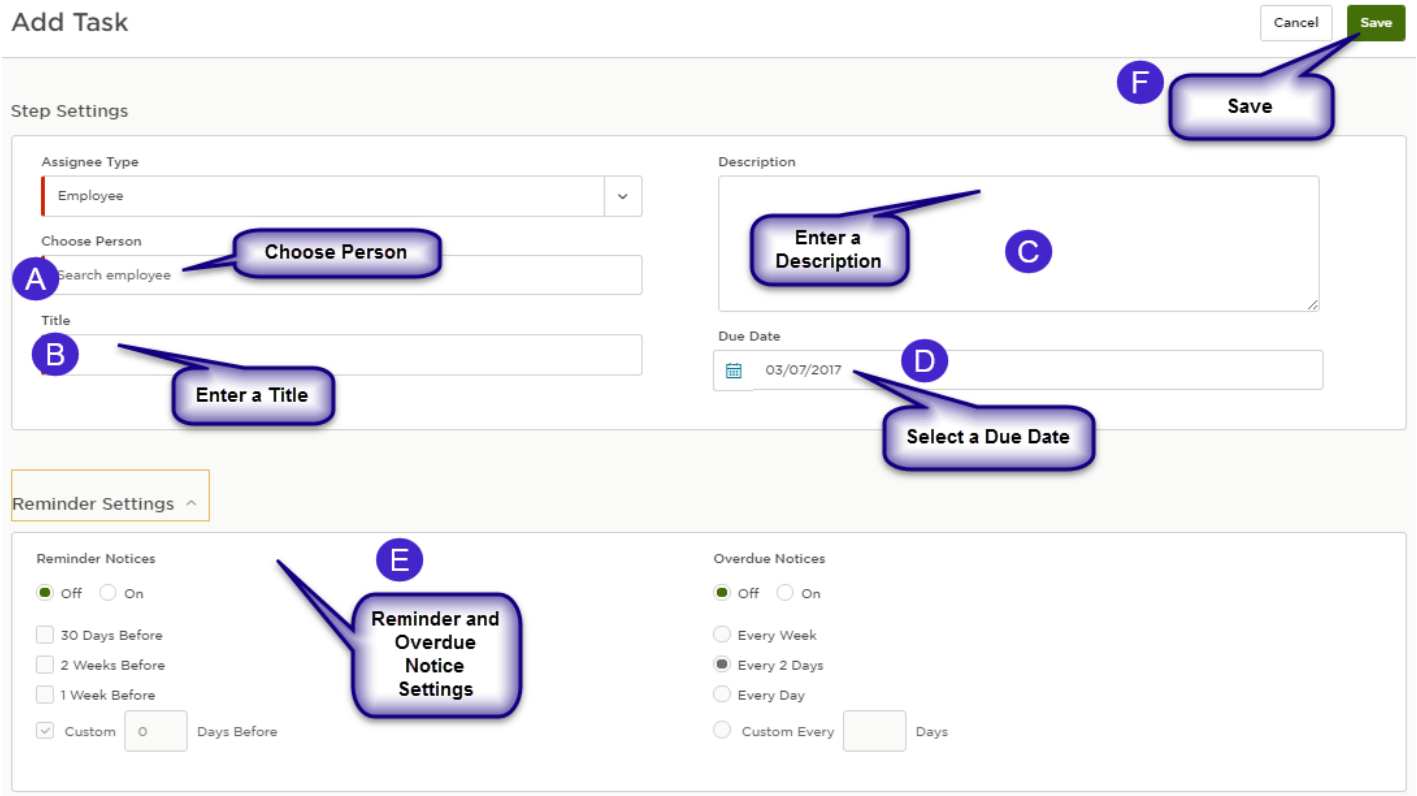
Tasks

1. The **Process Timeline Tasks** for the employee's plan acknowledgement, rating acknowledgement, self-rating (if applicable) and the manager/supervisor review will be defaulted into the plan from the performance (evaluation) plan template. These tasks will appear on the associated employee's (and manager/supervisor's) My Dashboard. Reminder and overdue notices are sent based on template configuration.

2. **New tasks** can be added to the performance (evaluation) plan by clicking on the **Add Task** button. Tasks added to an employee's performance (evaluation) plan are visible to the manager in the Process section, and they will show up on the employee's My Dashboard.

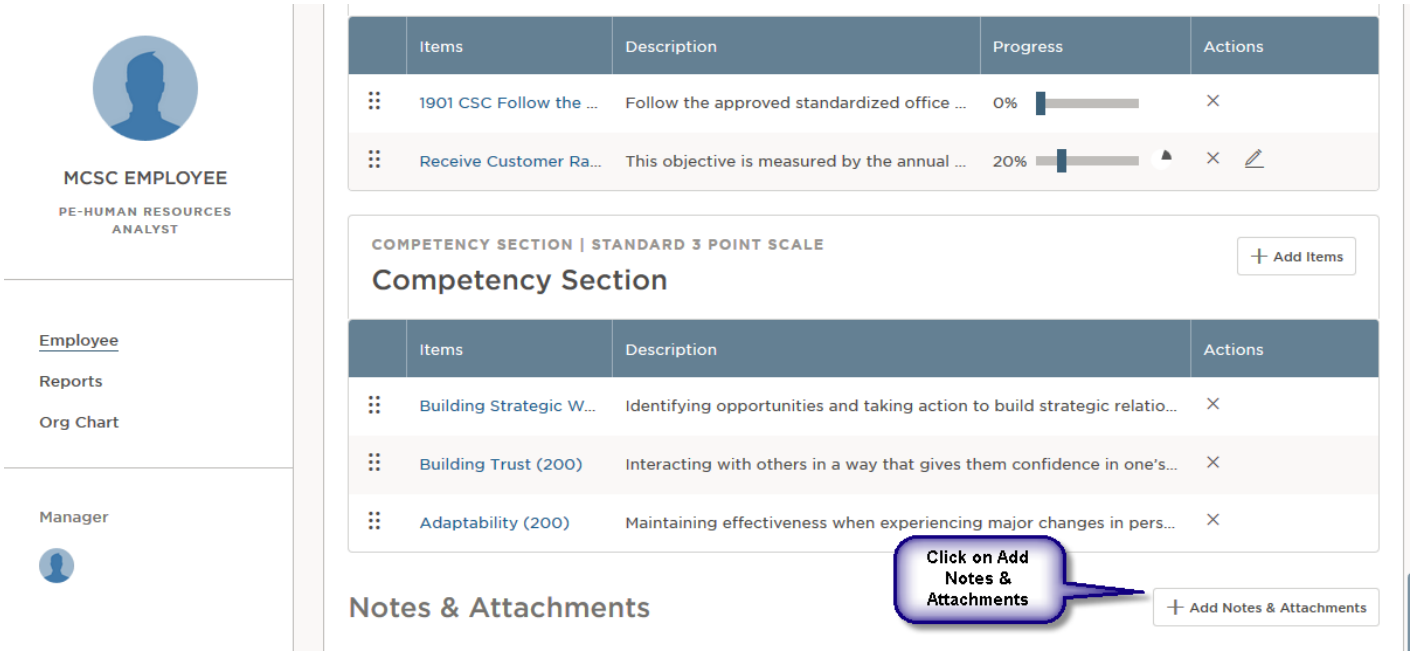


3. Complete the applicable boxes:
   a. Enter a name in **Choose Person**.
   b. Enter a title in **Title**.
   c. Enter a **Description** if necessary.
   d. Select a **Due Date** from the calendar.
   e. **Reminder Settings** can be set prior to the task due date or after.
   f. Click on **Save** or **Cancel**

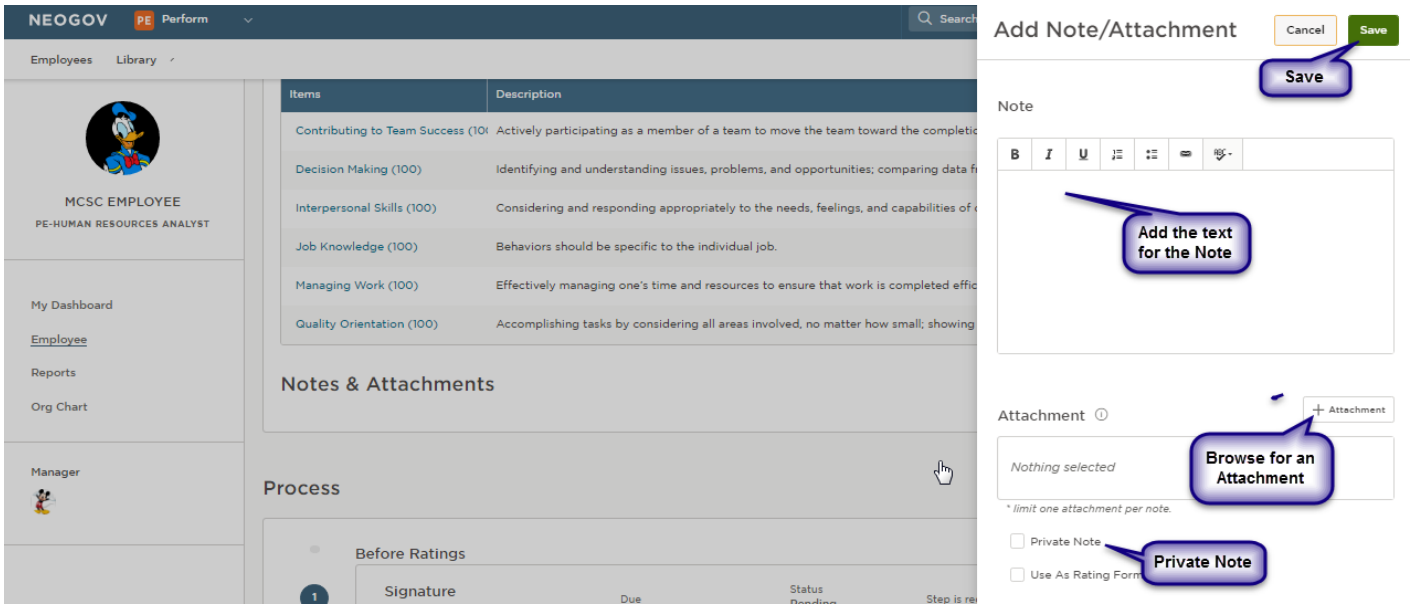


Notes & Attachments

1. **Notes & Attachments** can be added to the performance (evaluation) plan using the **Add Notes & Attachments button.**

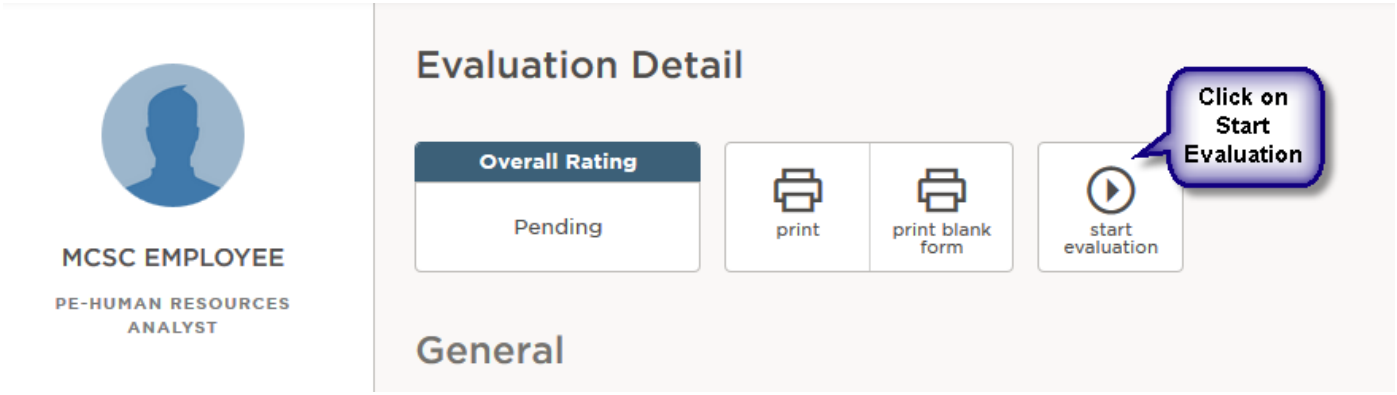


1. Notes can be typed directly. Some formatting including spell checker is available. Attachments can be added by using the +**Attachment** button. If Private Note is checked, only the manager/supervisor can see the note. Click **Save**.



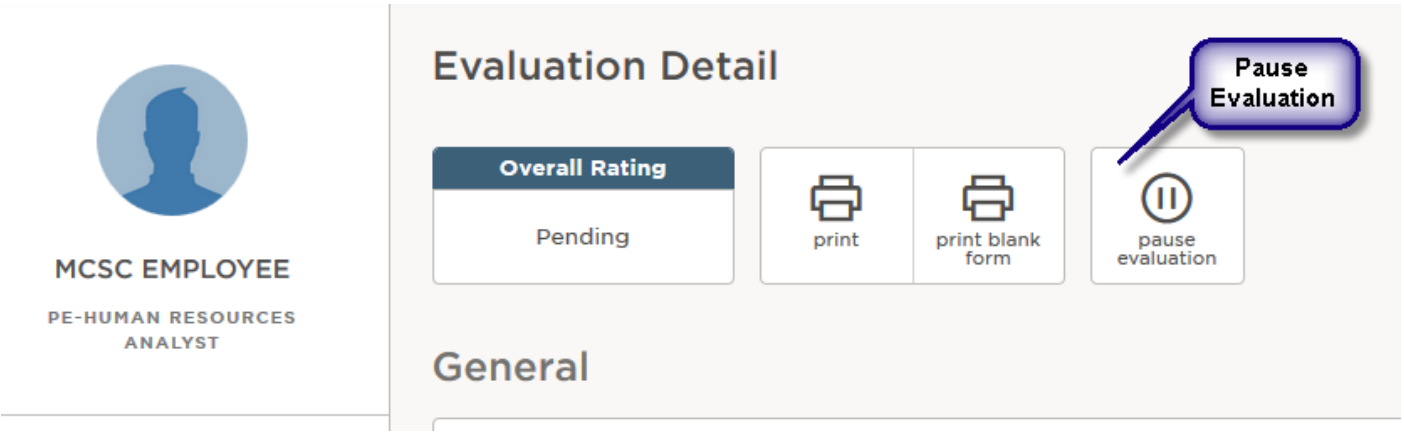
Start Evaluation

1. When the performance (evaluation) plan is complete, it can be made **ready for review** by clicking on the **play button, Start Evaluation**. Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status).



2. After the performance (evaluation) plan is started/ready for review (published), an email is sent to the employee regarding the **Acknowledgement of Plan**.

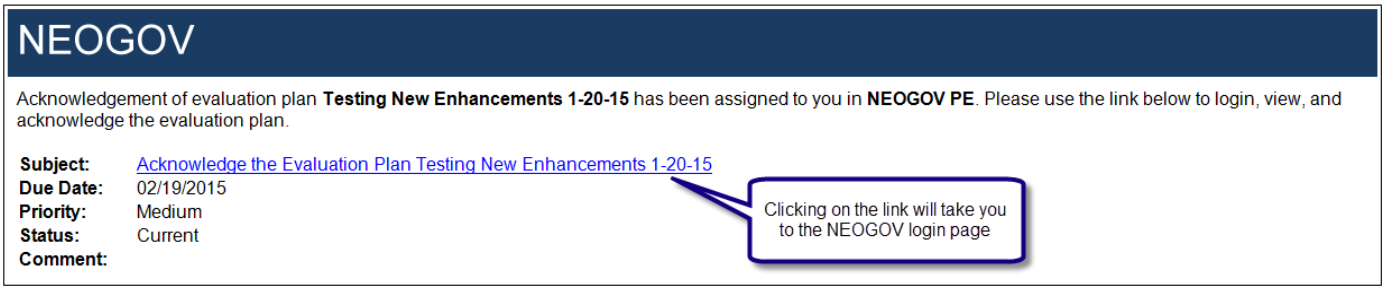
3. The performance (evaluation) plan can be paused/reverted to draft status (unpublished) if changes need to be made to any part of it via the **pause button**. If changes are made to Objectives/Competencies, the Acknowledgement of Plan email for the employee will be sent again once the evaluation is started/ready for review (published).



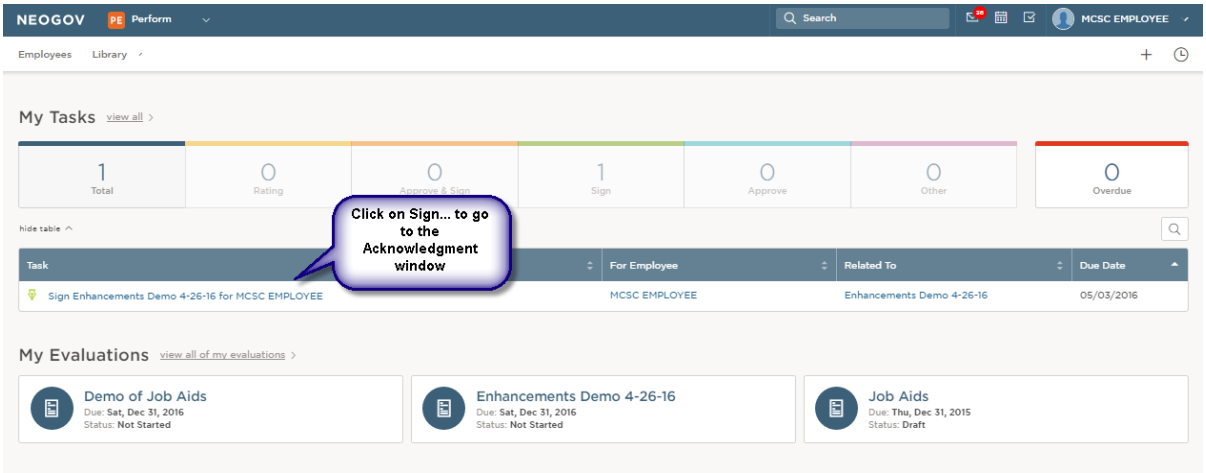
4. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started.**

Acknowledgement of Plan

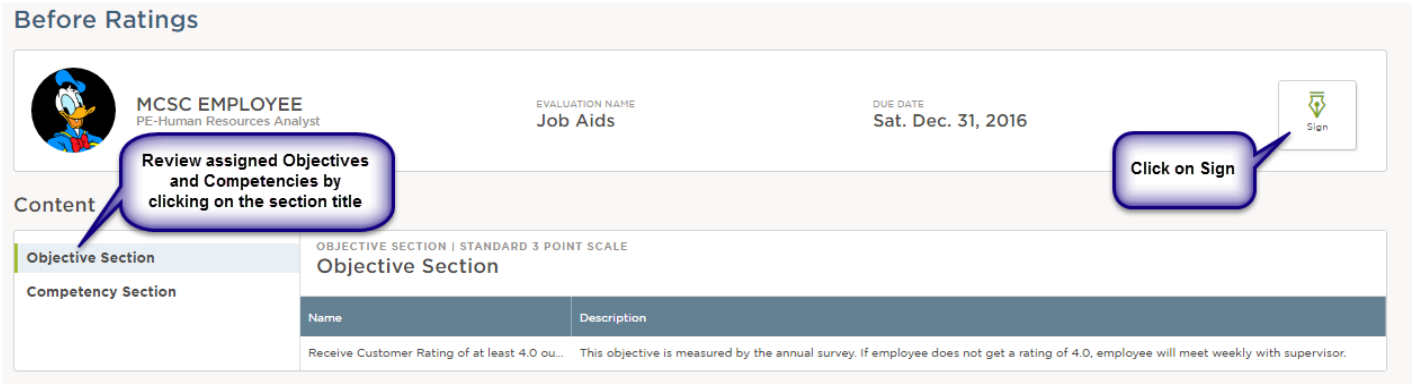
1. When an employee and manager agree on the performance evaluation plan established for the review period, including objectives and competencies, the manager will make the evaluation ready for review. This locks the plan to additional changes. At that time, the employee will receive an **email** instructing them to login to NEOGOV PE to acknowledge the performance evaluation plan. The email will look similar to the one below.



2. On the **My Dashboard** screen, you will see an Acknowledgement task listed in the **My Tasks** section. Click on the subject, **Sign**… to go to the Acknowledgement window.

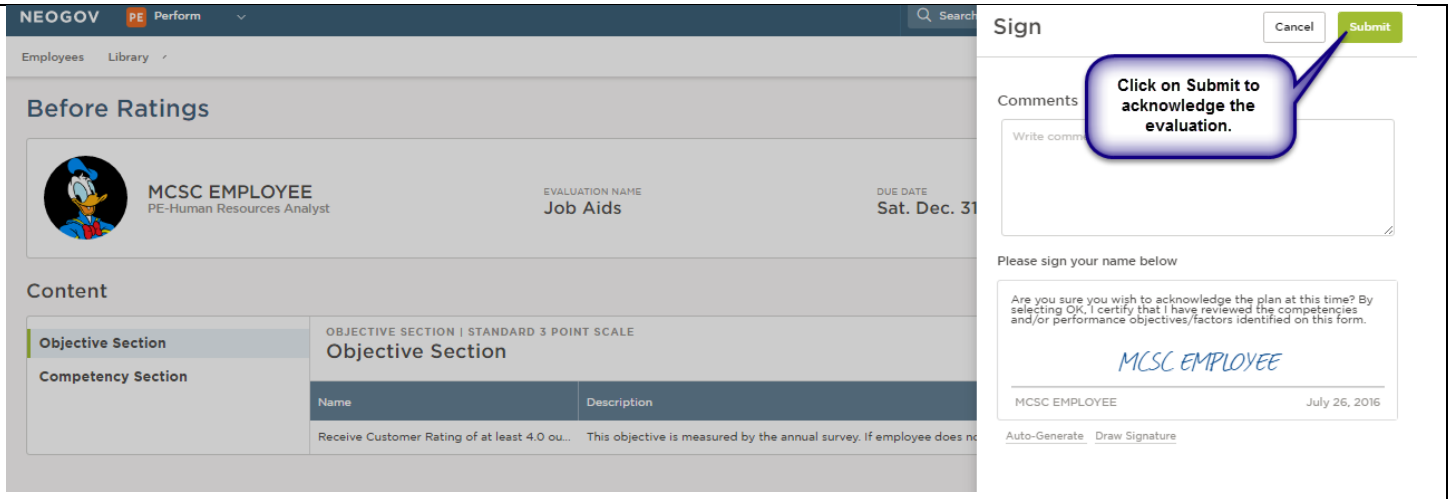


3. In the **Evaluation Acknowledgement (Before Ratings)** window, review the assigned performance evaluation by clicking on each section title



4. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge/agree to the evaluation by clicking on **Submit**. The evaluation will now be available for rating by your manager.

   NOTE: Clicking on the **Cancel** button will return you to your dashboard without acknowledging the evaluation plan. If you do not acknowledge your evaluation plan, please follow up with your manager.



5. The **Acknowledgement** will no longer appear on the **My Dashboard** screen.

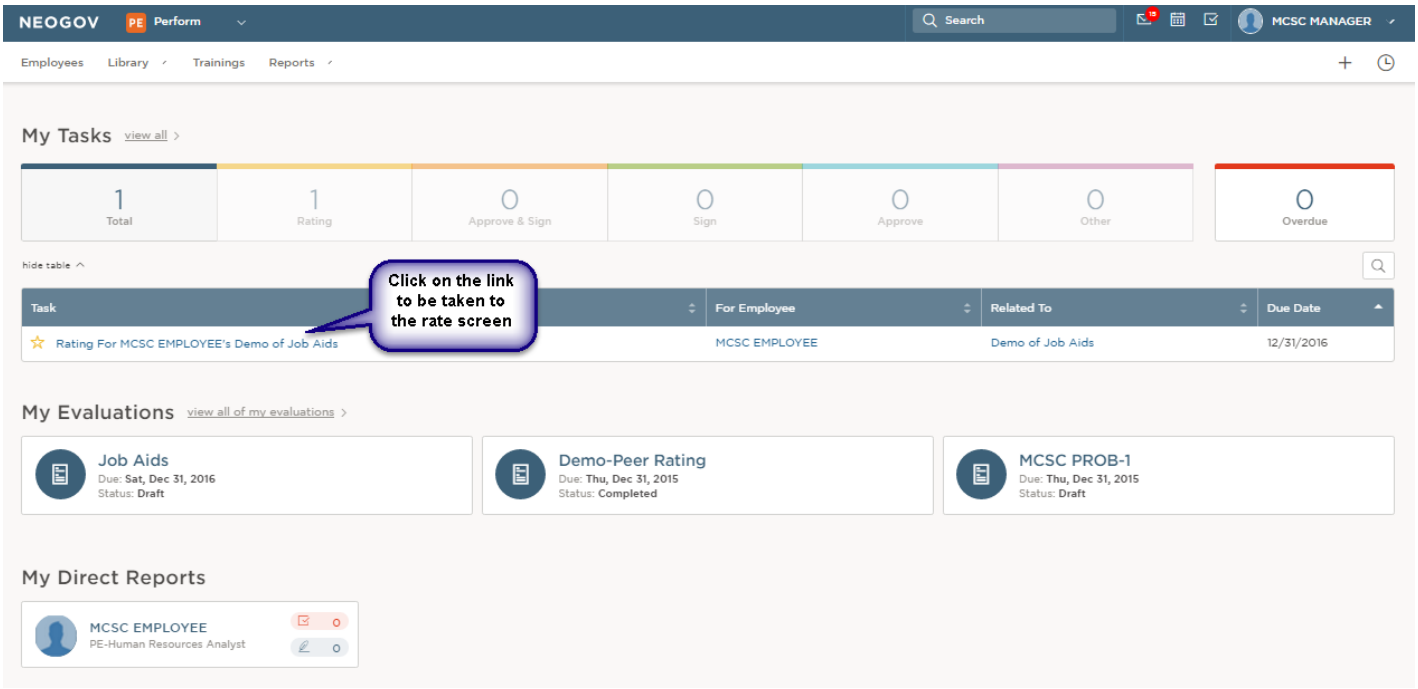
   NOTE: If a performance evaluation plan is reverted to Draft Status, and a change is made to Objectives and/or Competencies, a new email will be generated asking for acknowledgement of the updated evaluation plan. Follow the steps above to re-acknowledge the modified performance evaluation plan.

Rating (Both Self-Rating and Rater of Record-Manager)

1. There are two options to get to the Rate screen:

   Option 1:

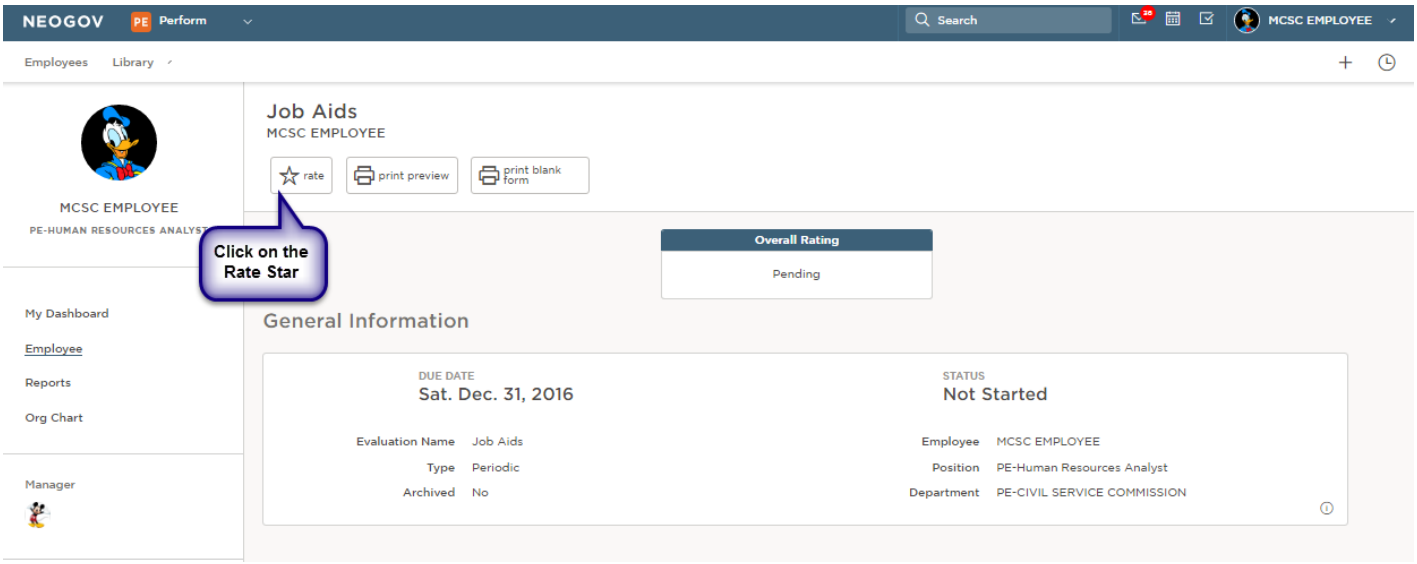
   On the **My Dashboard** screen in the **My Tasks** section click the **Rate** link in the **Task** column.



Option 2:

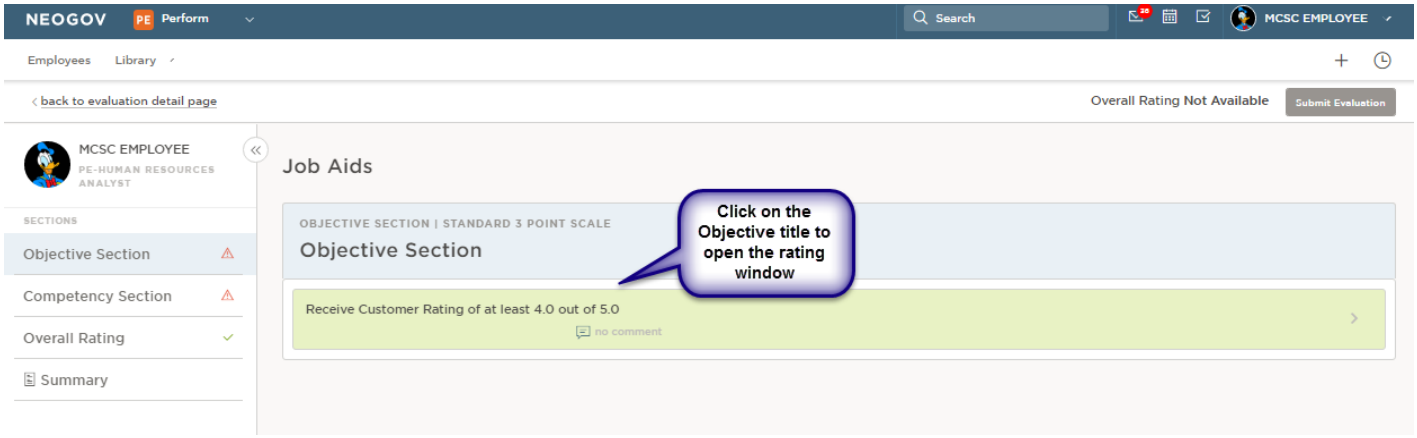
On the **My Dashboard** screen click on the **Evaluation Card** that needs to be rated.

On the Evaluation Detail page, Click on the **Rate** star.



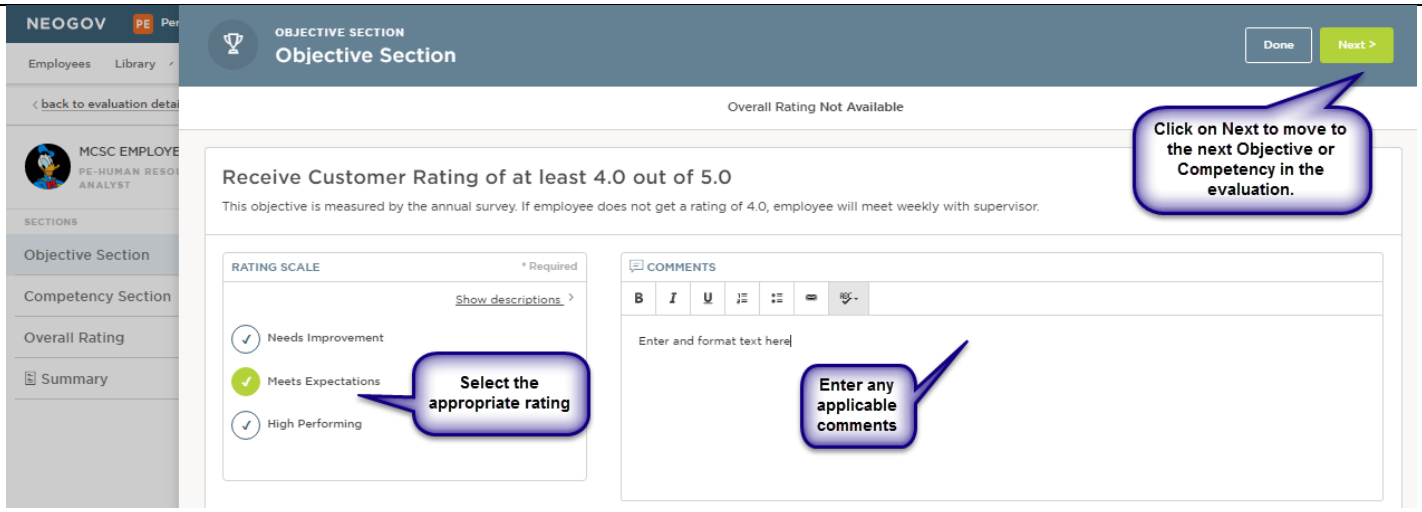
2. On the **Performance Evaluation Rating Form** screen, complete the **Objective and Competency Sections** by clicking on each Objective/Competency title to open the associated rating window.

   Note: You can also navigate through the objectives and competencies by clicking **Next, Prev,** or **Done** as you complete the rating.

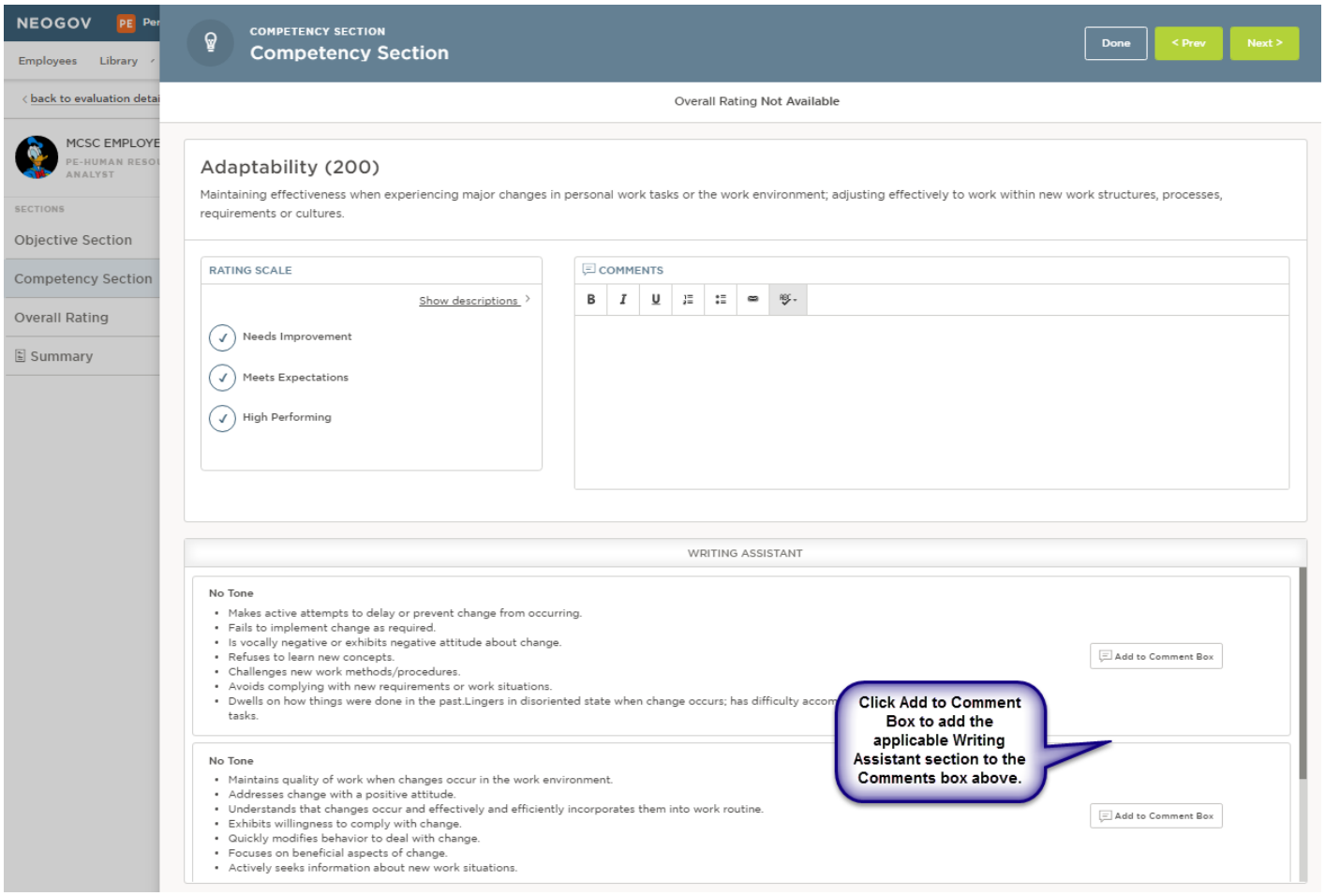


3. Click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click on it again). Comments can be entered and formatted. Click on **Next**.

   NOTE: If a self-rating is being done, the manager will see the rating and comments (after the rating is submitted).



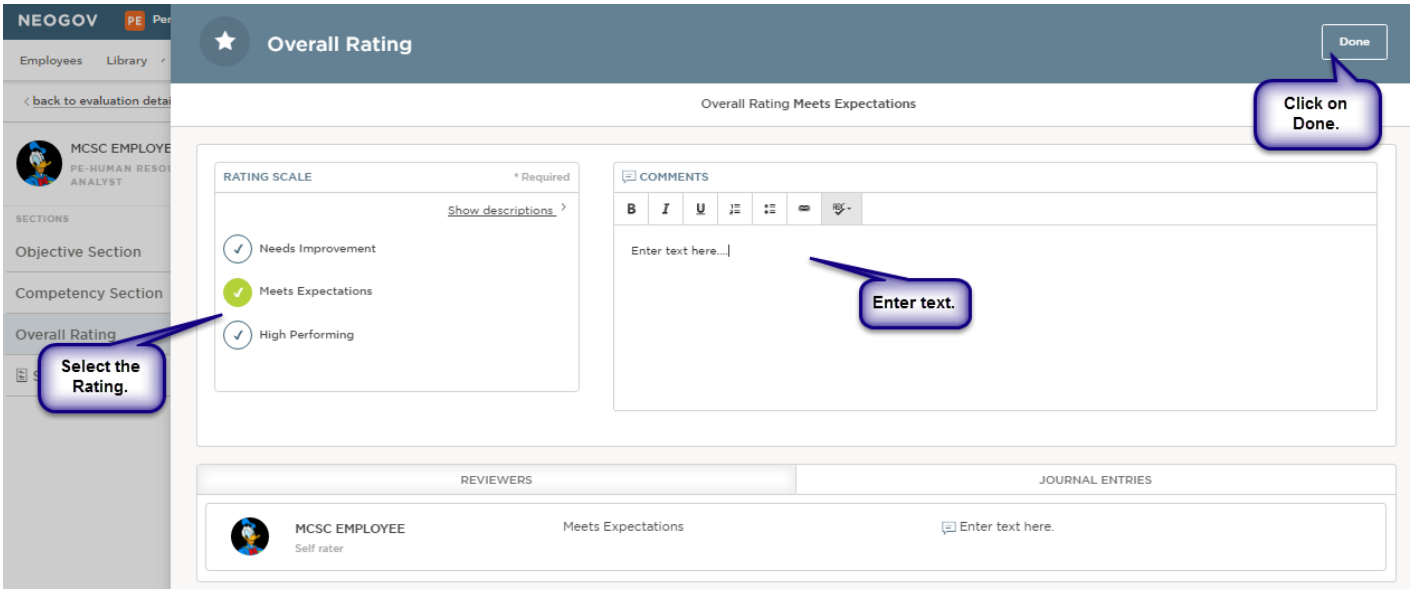
4. **Writing Assistants** are available for **competencies** only. Writing Assistants contain the Behaviorally-Anchored Rating Scales (BARS) for the competency and provide examples of behaviors that can be used to determine the appropriate rating.



5. Once the BARS statements have been entered into the evaluation, they can be formatted and deleted completely or partially.

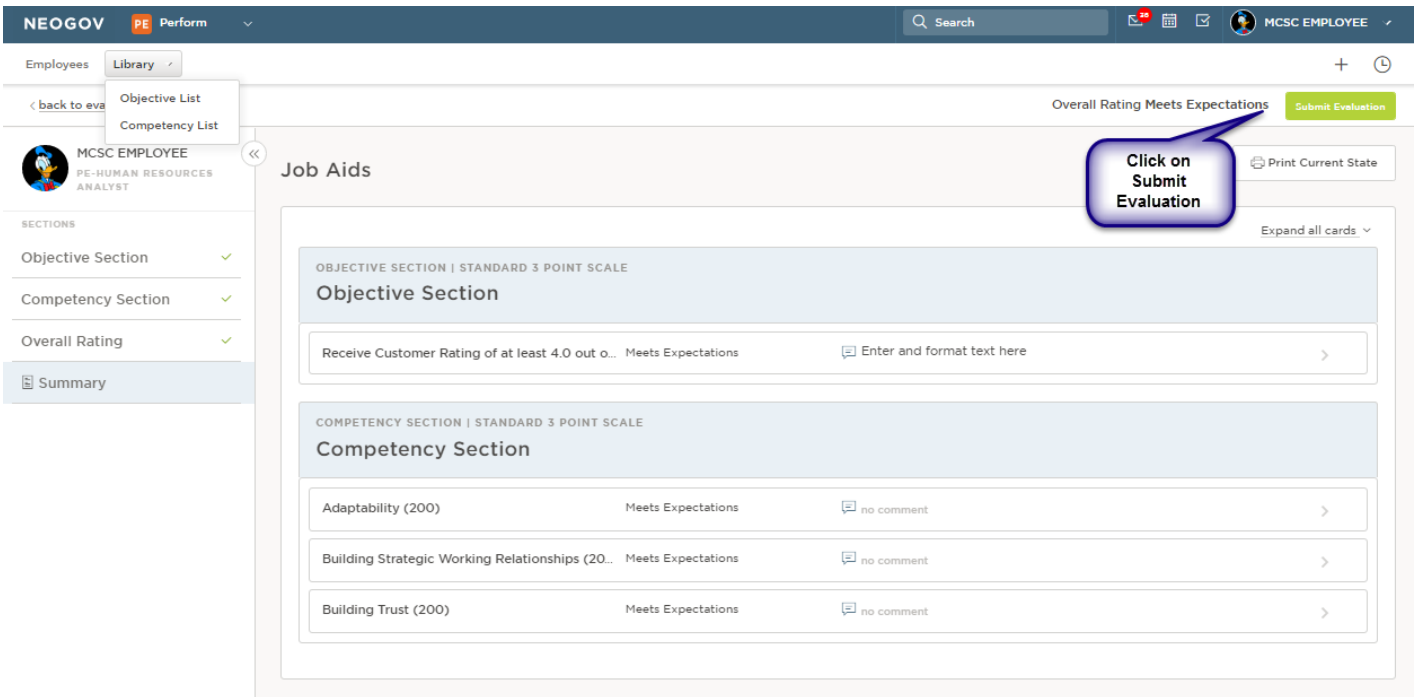
6. An **Overall** rating is required for the evaluation. To complete the **Overall Rating**, click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click it again). Comments can be entered and formatted. Click on **Done** when finished.

   NOTE: If a self-rating is being done, the manager can see the selected ratings and comments.

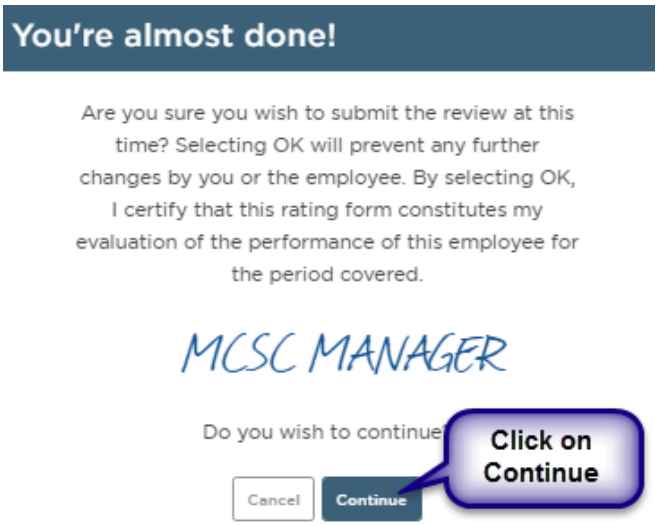


7. The system automatically saves the work.

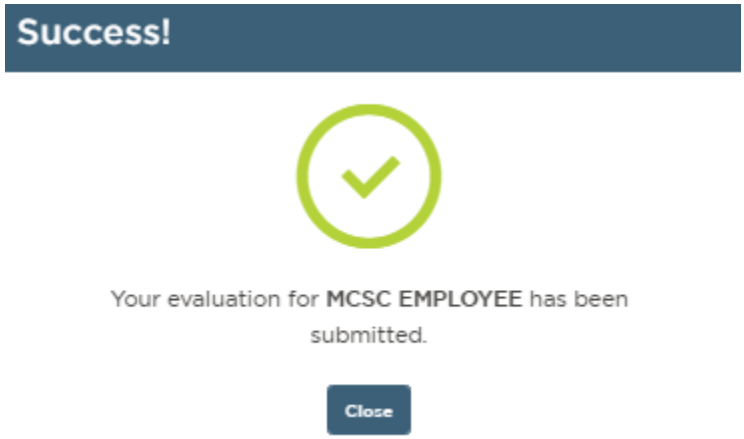
8. Review the Summary page. Click **Submit Evaluation** when done with the rating. Click **Print Current State** if you would like to maintain a hard copy.



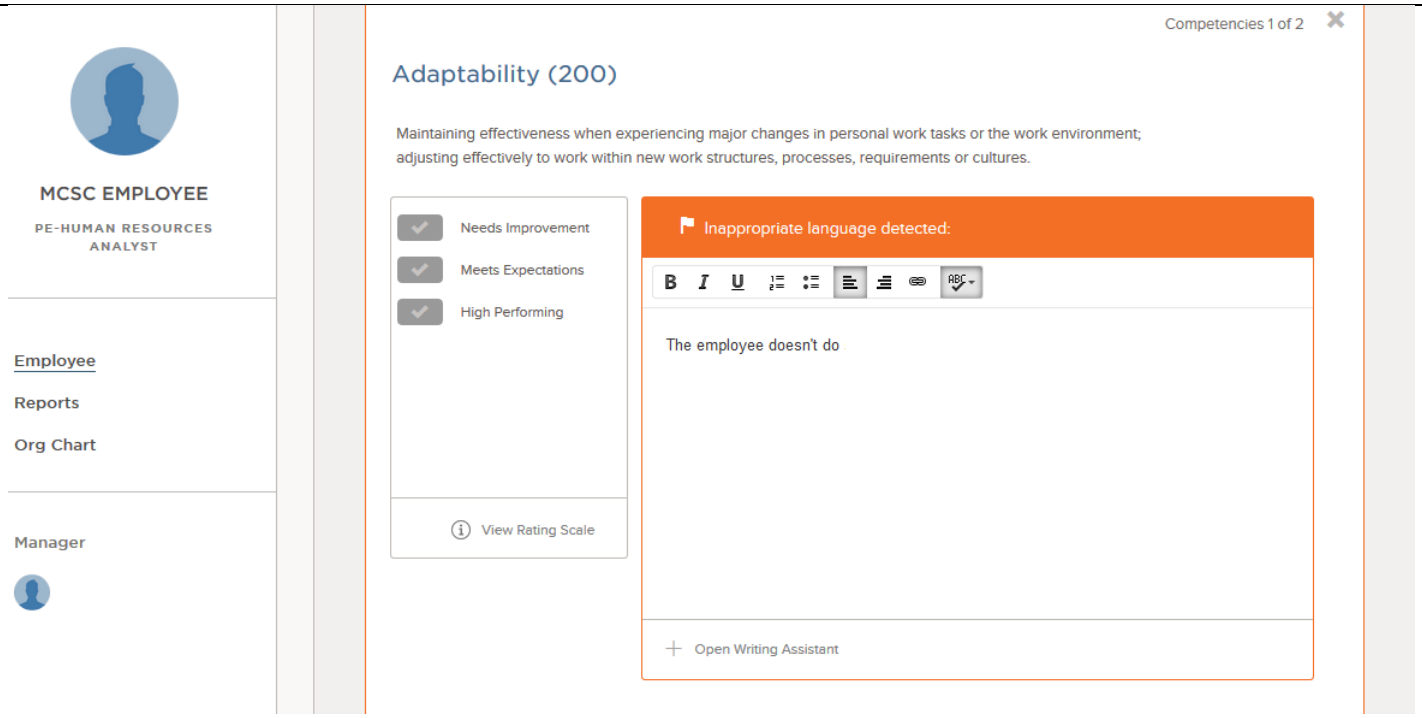
9. If **Submit Evaluation** is selected, the system will provide a certification statement for review. If you feel changes are necessary, click **Cancel.** If changes are not necessary, click **Continue.**



10. After selecting **Continue** a confirmation will appear stating that it has been submitted. The review/rating is now complete.



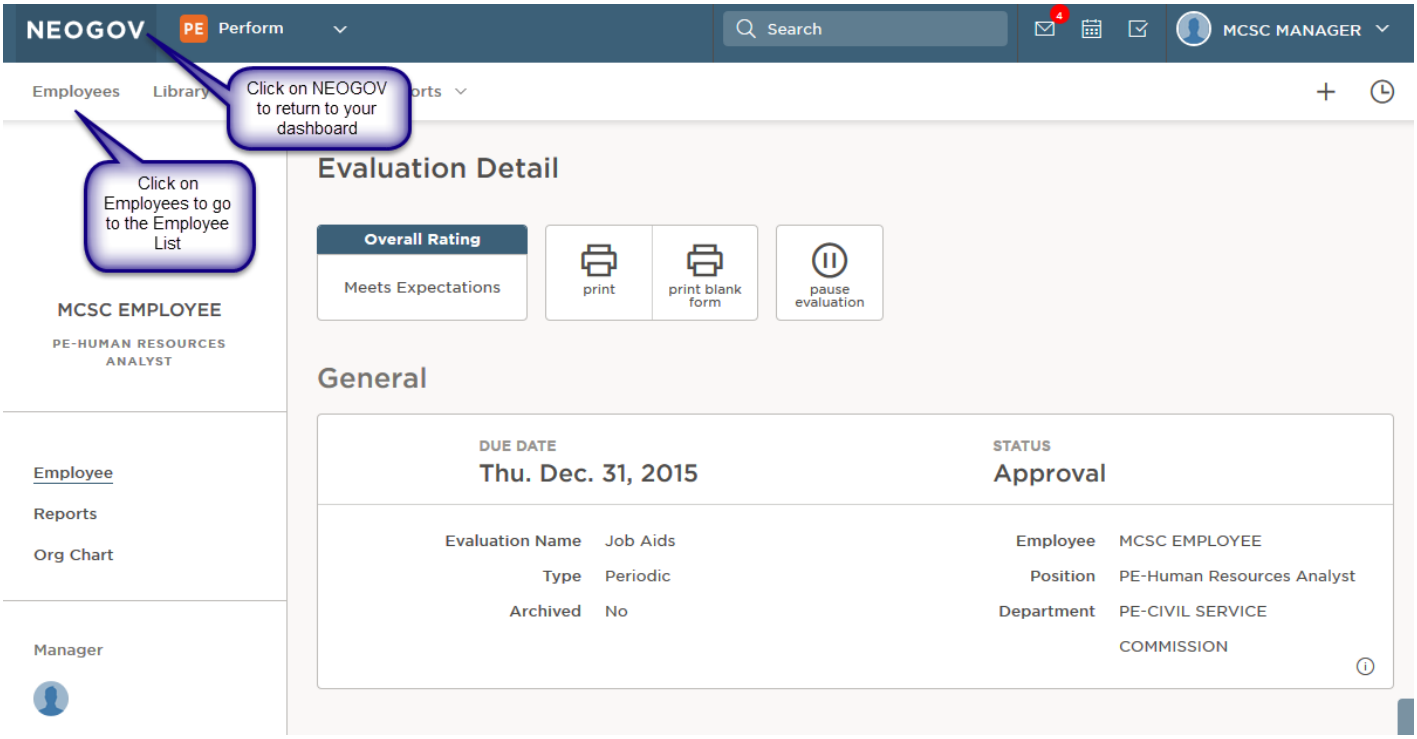
11. Please note that the system has a language checker in it, and if you try and submit a self-rating that contains inappropriate language, the system will alert you and provide you with an opportunity to make a change before certifying and submitting.



12. **For Managers**, once finished with a rating there are two options to rate another employee:

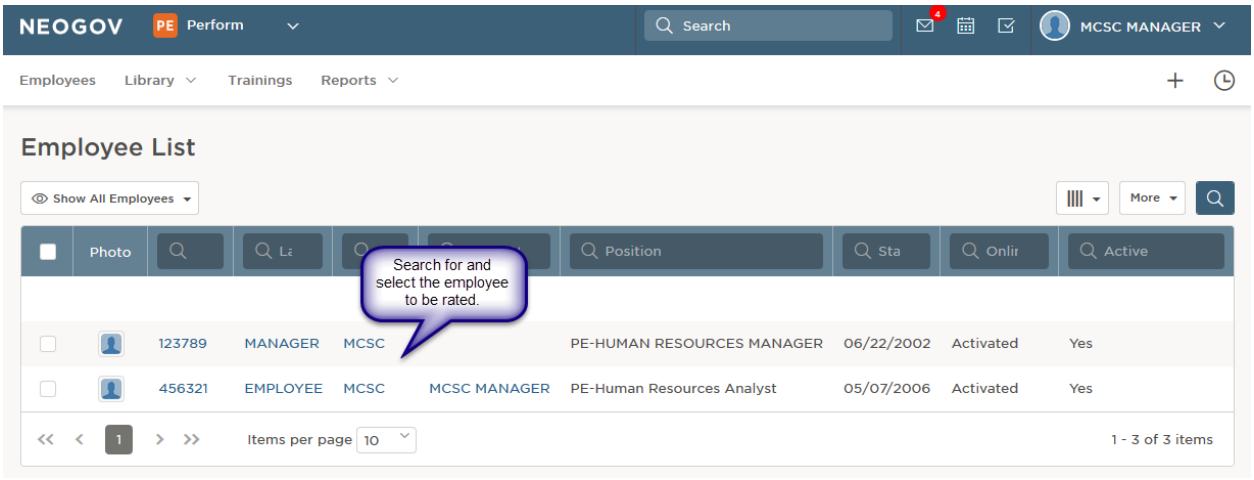
    Option 1:

    Click on **NEOGOV** to return to your dashboard.



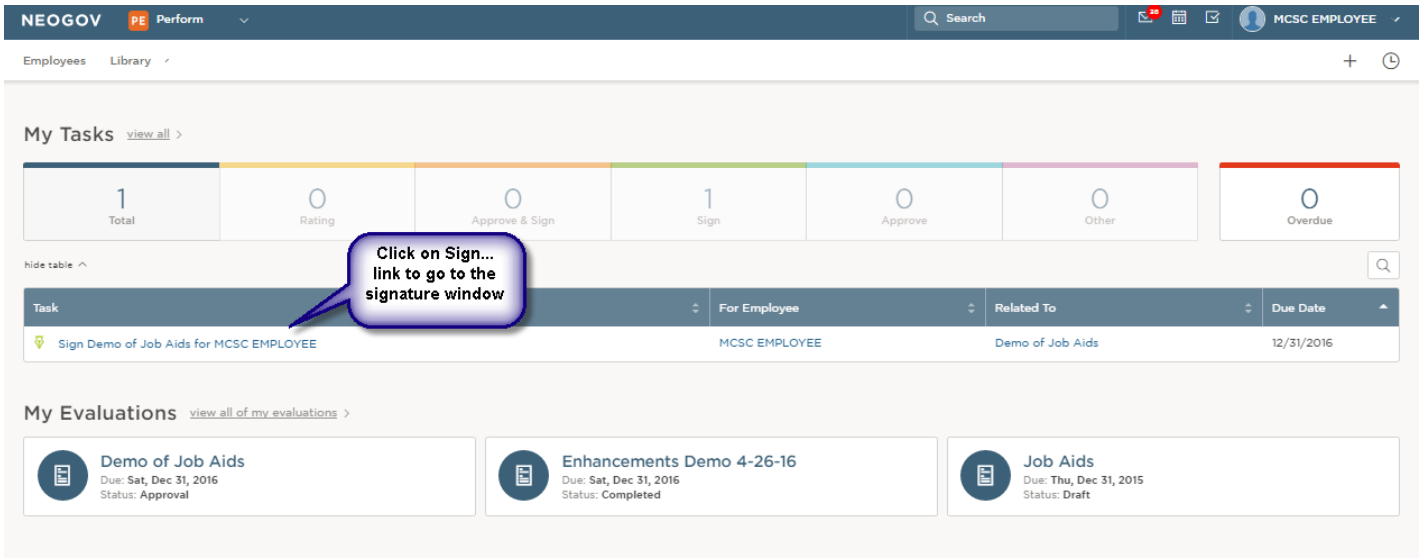
Option 2:

Click on **Employees** and search/select the employee to be rated. This takes you to the **Employee Details** screen.

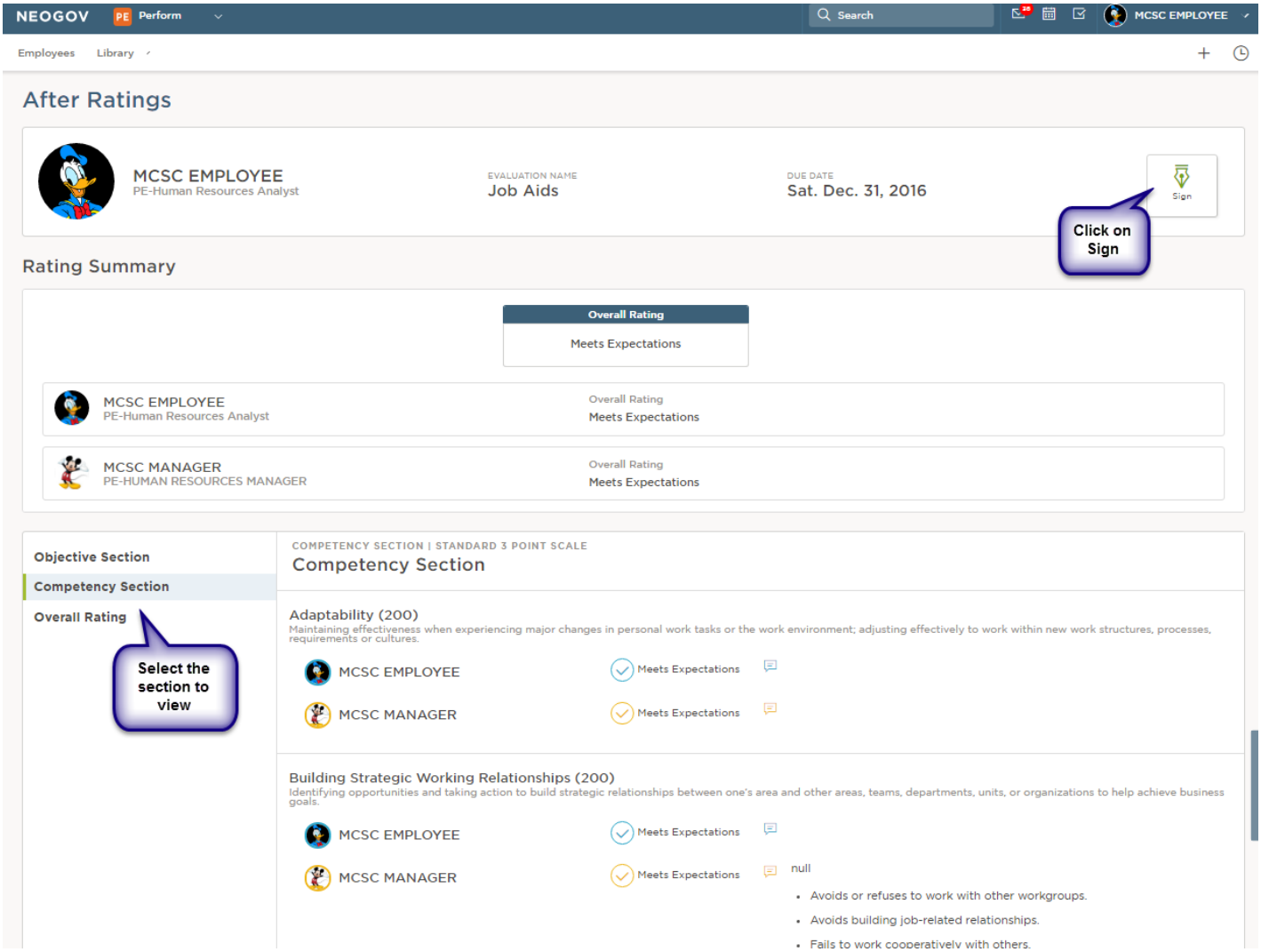


Acknowledgement of Rating

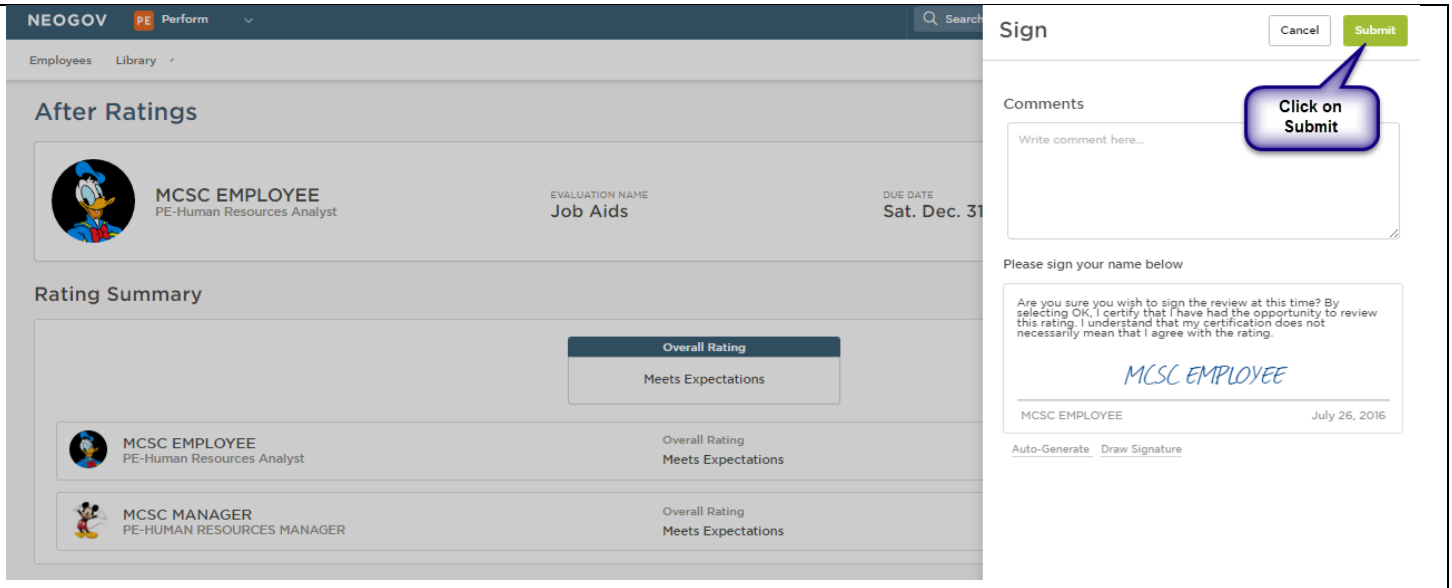
1. When you log in, you'll arrive at your **My Dashboard**. Because you have a rating that is ready for signature you will see a signature task listed in the **My Tasks** section. Click on the subject, **Sign**… to go to the Signature window.



2. In the **Evaluation Review (After Ratings)** window, review the ratings assigned to each objective and competency in the performance evaluation by clicking on the associated section.

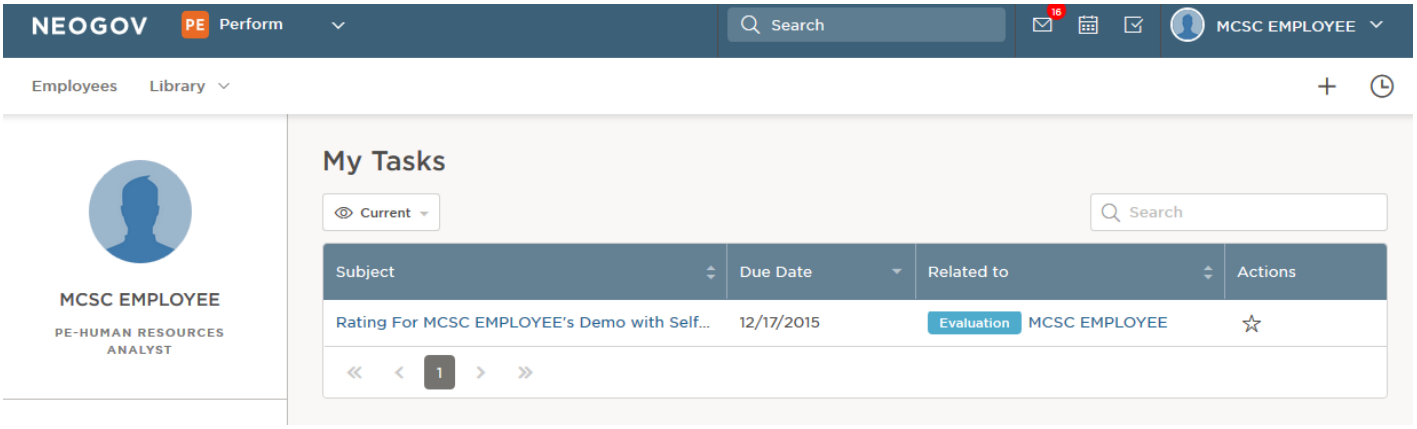


3. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge/agree to the rating by clicking on **Submit**.



NOTE: Clicking on **Cancel** will return you to your dashboard without acknowledging the performance (evaluation) plan rating. If you do not acknowledge your performance (evaluation) plan rating, please follow up with your manager.

4. The **Request for Signature** will no longer appear on your **My Dashboard**.

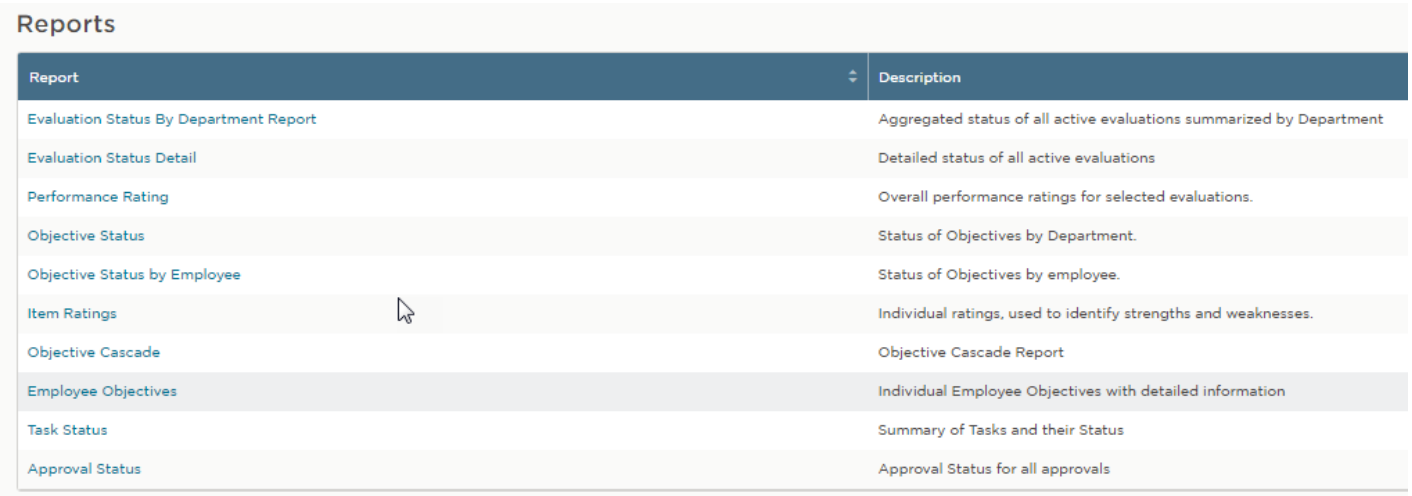


Reports

1. The menu option is only available to the Manager role based on configure system security. Managers have the ability to run reports on their direct reports.

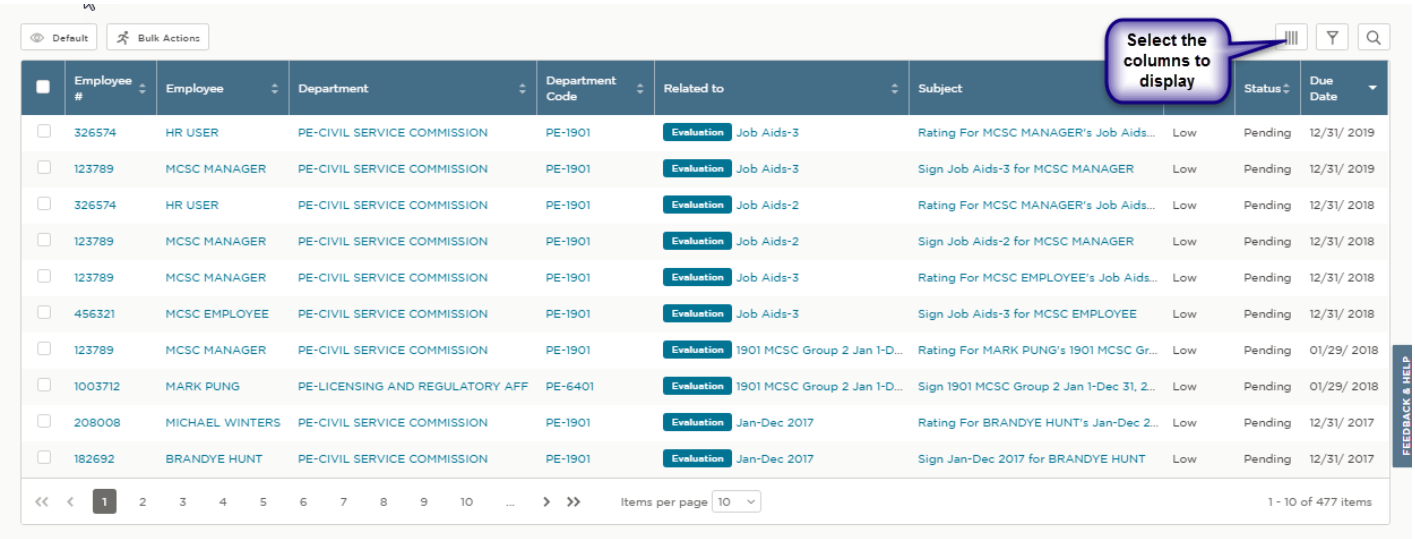
2. Log in and from the **Dashboard** select the **Reports** menu option and click on **Reports**.

3. All of the reports listed have the same general configuration and field choices; however they are specific to the title listed.
   NOTE: For purposes of this document, I will select the **Task Status Report** to go over the fields and their functions.



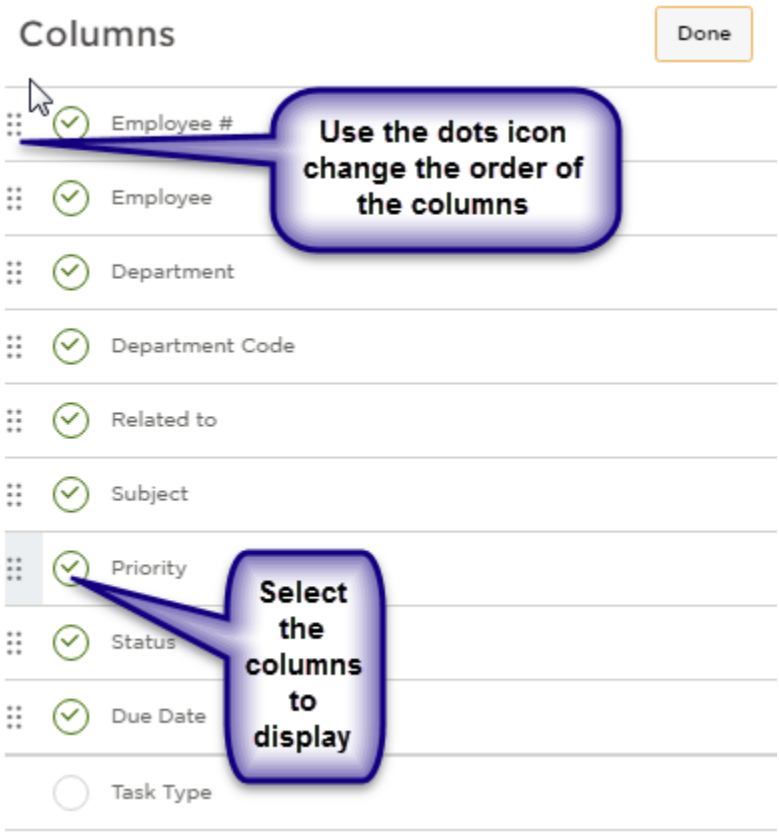
4. Select your report and then **Scroll down** to the section where you can select and arrange the **fields** you would like displayed on your custom report.

5. Select the icon with three lines on it to choose the columns to display.



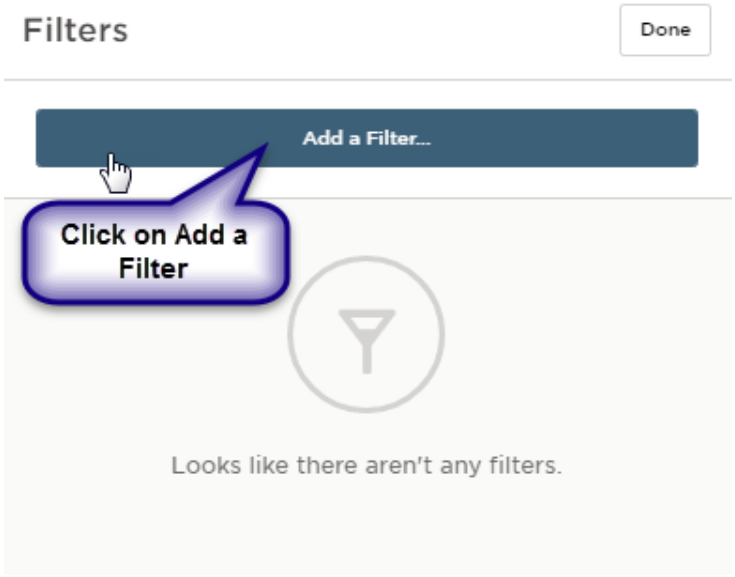
6. In the **Columns** fly out window, **select** the columns to display by clicking on the **name**. When a **green**

check mark appears next to the column name, then the column will display in the report. To **deselect** a column, click on the name. Use the **6 dots icon** to **drag and drop** the columns to the desired order/placement. When finished, click on **Done**.



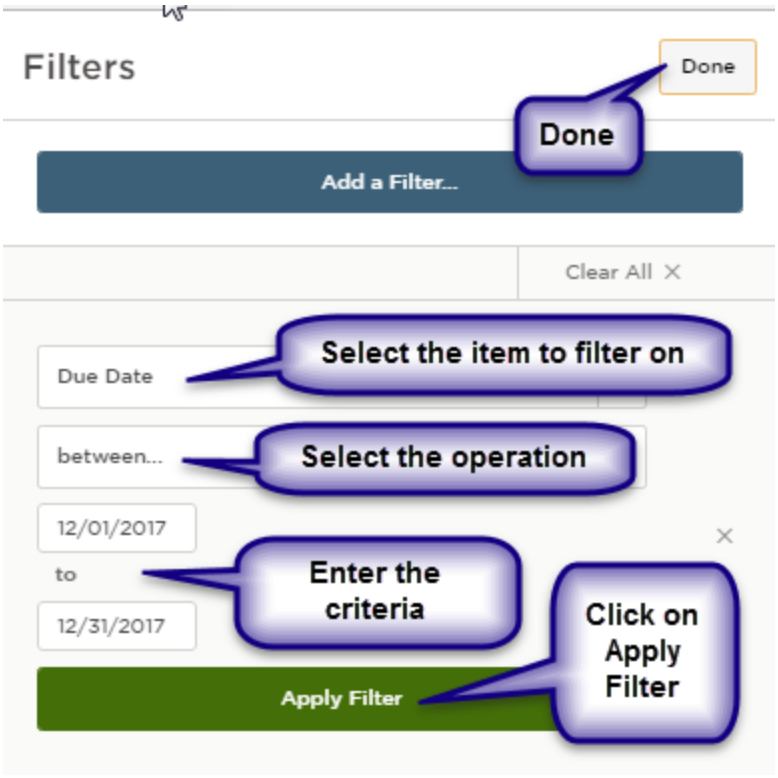
7. Use the **Filter** icon to add any applicable filters to the report.

8. On the **Filters** screen, click on **Add a Filter**.

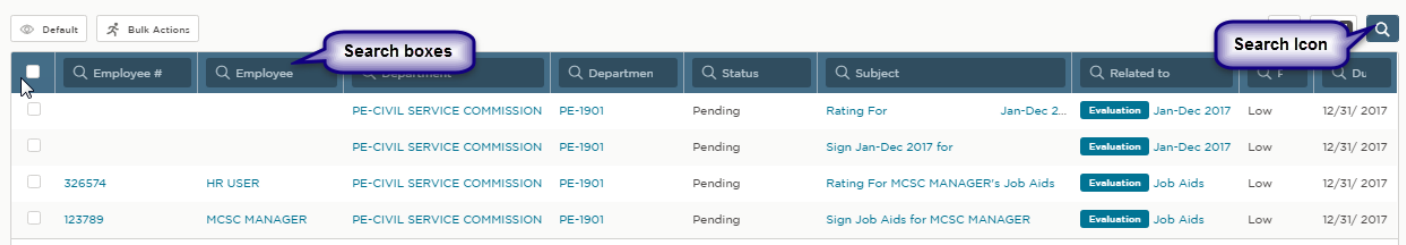


9. Select the item to **Filter** on. Then add the **Operation** to take place and any **Specific Criteria**. Click on

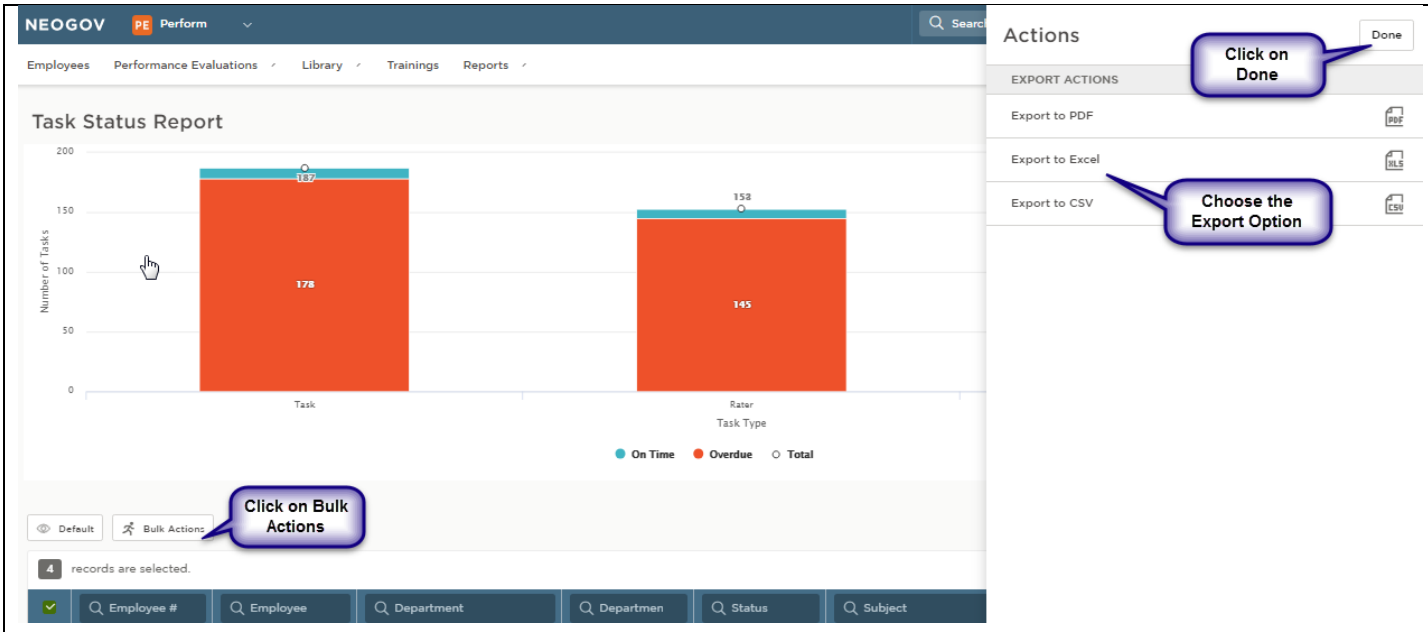
Apply Filter. If additional filters are desired, repeat the steps. When all filters are in place, click on **Done**.



10. The search icon can also be used to filter by typing the criteria into the search box.



11. When your data is set, and if you'd like to **export** it to PDF, Excel, or CSV format, select the records you'd like to export and click on **Bulk Actions**. Then choose the **Export** option and click on **Done**.



12. To return to your dashboard click on NEOGOV.